Capital Advisors

Wealth Management

Who We Are

Founded in 1978, Capital Advisors is an employee-owned SEC Registered Investment Advisor that provides wealth management services to individuals and institutions.

Over $2.5 Billion in assets under management.

We act as a Fiduciary for clients. This means Capital Advisors has a fundamental obligation to act within the best interest of the client at all times. We do not sell products for commissions.

Capital Advisors claims compliance with the *Global Investment Performance Standards (GIPS®) and has been has been independently verified for the periods 1/1/2007 – 12/31/2017.

Read More (https://www.capitaladv.com/pages/firm-profile)

Active Management (https://www.capitaladv.com/

We use a combination of fundamental and tactical strategies to change the asset allocation of your portfolio based upon current risks and opportunities we see in the market.

Strategies

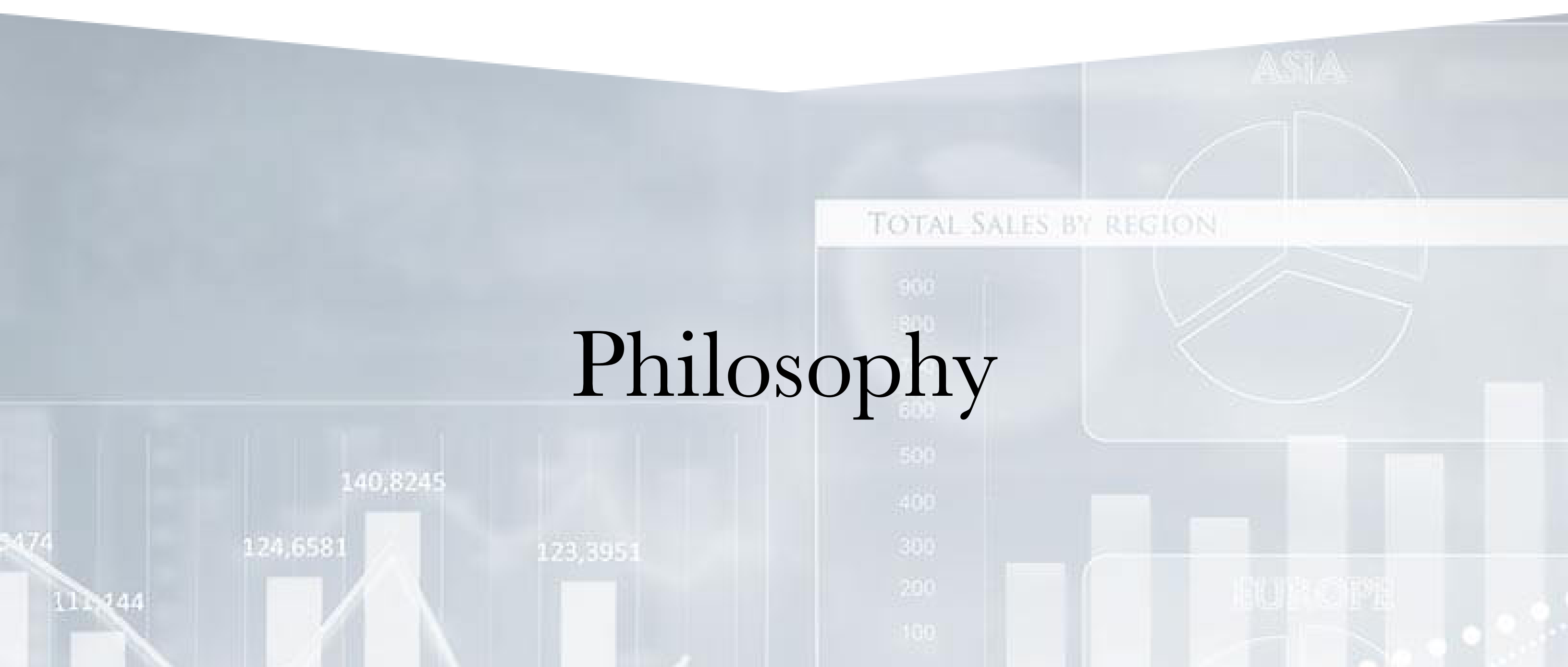
Fundamental Strategies (https://www.capitaladv.com/pages/strategies/managed-equity-Strategies)

Individual stocks and bonds used for active risk management, enhanced transparency, customization & better tax efficiency.

Tactical Strategies (https://www.capitaladv.com/pages/strategies/tactical--etf-strategies)

Rules-based strategies executed with ETFs support broad diversification and flexibility to adjust risk market exposure with changing market conditions.

Read More (/pages/strategies)



Philosophy

Capital Advisors’ investment philosophy strives to be uniquely transparent. Our theory, evidence and implementation provide a detailed approach to investment management. We educate clients on why we invest the way we do, how our strategies can be effective, and how each strategy works.

Read More (https://www.capitaladv.com/pages/portfolio-construction1)

Contact Us

Call us. Let's have a candid, transparent discussion about what we can do for you.

Phone: 866-230-5879 (tel:866-230-5879) | Fax: 918-584-8866 (tell:9185848866)

Office Locations (https://www.capitaladv.com/pages/OfficeLocations1)

Team Directory (https://www.capitaladv.com/pages/about-us-1/team-directory)

Form ADV Part 2A (https://www.capitaladv.com/uploads/cms_uploads/2019/03/03-26-2019-cai-form-adv-part-2-1553625441.pdf)

2222 South Utica Place, Suite 300, Tulsa, OK 74114 (https://goo.gl/maps/zMTz2GbH4Dk)

In case of business disruption, please contact your custodian directly.

Custodian contact information can be found on your most recent brokerage statement.

*To receive a list of composite descriptions or a fully compliant presentation, Click Here (https://www.capitaladv.com/pages/strategies) or

contact Debra Konieczny at 866.230.5879 / debrak@capitaladv.com