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About Pinnacle Investment Advisors

Our investment philosophy is driven by the principle of minimizing risk while capturing the most competitive rates
of return. We build customized portfolios for our clients with the proprietary strategies detailed below. Every situation is unique and we provide customized solutions to help you meet your �nancial goals.
Contact Our Team To Schedule A Free Consultation

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Professionals
Working for you

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Investment Strategies

More �an 20 Years Of Experience And Client-Centered Philosophy

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Diversi�ed and Custom Strategies

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Years of Client History

Since 1996

Investment Strategies

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Blue Chip

Pinnacle’s Blue Chip Portfolio
seeks to provide performance
similar to the Dow Jones
Industrials.

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Convertible/High
Yield

Seeks to provide high total
returns from income producing

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Intermediate Bonds

Pinnacle seeks higher yields
and total returns than are
available with short term
bonds.

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securities with the potential for capital appreciation.

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Suze Orman

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Warren Bu�fett

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Franklin D. Roosevelt

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Anything that gets people to think harder about their �nancial security and take some responsibility is a good thing.

It’s better to hang out with people better than you. Pick out associates whose behavior is better than yours and you’ll drift in that direction.

I'm not the smartest fellow in the world, but I can sure pick smart colleagues.

Why People Choose Us

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Customized Investment Strategies

We work with clients to develop and deliver investment solutions that are customized to the client’s de�ned requirements.

Our Mission & Values

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Market Oriented Strategies

Extensive research and analysis underpinning all Pinnacle services. Customized, professional management of
client investments.

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Client Focused

Well-constructed, well-diversi�ed portfolios aligned with the client’s investment policy statement.

We are a local and independent Registered Investment Advisor. We are located in the heart of downtown Tulsa and our team has over 100 years combined experience. Using our diverse backgrounds in �nance, accounting, law, tax planning, risk and asset management, we are able to provide our clients with excellent �nancial analysis. More importantly, our team has real-world experience and we continually work to keep ourselves at the top of our industry.

Local & Experienced

Trustworthy

As a Registered Investment Advisor, we operate with a �duciary duty. This means that our client’s best interests are �rst and foremost in any decision that we make. We operate as a “fee only” �rm – we are compensated solely by our clients (charged on assets under management). We do not make a commission on any product, we do not split fees and there are no hidden costs. We will never recommend a product unless it �ts your individual risk tolerance.

We o�er a full suite of �nancial services. We recognize that a successful �nancial strategy is one that your are comfortable with and �ts within your lifestyle. There is no one size �ts all model. Every client is unique and every client has di�erent life goals. Consequently, we tailor our advice to �t within our individual time horizon, risk tolerance and return expectations.

Custom Solutions

Pinnacle Investment Advisors was established to provide competitive investment management services and �nancial planning for our clients. We are committed to building generational relationships that are built on trust, integrity and personal service. The idea relative value and the objective comparison of risk and return, guides both our approach to service and our investment decisions. Every situation is unique and we provide customized solutions to help you meet your �nancial goals. Our sole mission is building and protecting your wealth while delivering a high level of client service – our reputation depends on it!

Client Centered

Prepare for the Road Ahead. Consult with a Financial Planner.

Our Experts Team

David Poarch
Managing Partner
David Poarch is a Registered Investment Advisor and Managing Partner.

 Email David

Get in Touch

Brett Kramer, CFA
Managing Partner

Brett Kramer is a Registered Investment Advisor and the Chief Investment O�cer.

 Email Brett

Joel Kantor

Partner, Financial Planner

Joel Kantor is a Registered Investment Advisor and past Certi�ed Financial Planner designee.

 Email Joel

Aimee Boyer, J.D., CFP
Financial Planner/ Portfolio Manager

Ms. Boyer is a Registered Investment Advisor and joined the �rm in 2011.

 Email Aimee

Robert (Toby) Moore
Financial Analyst/ Trader

Mr. Moore is a Registered Investment Advisor and has over 20 years experience in the investment industry.

 Email Toby

Tom Hayes
Financial Advisor

Mr. Hayes is an Investment Advisor with over 39 years experience in the �nancial industry.

 Email Tom

Jochen Talmon
Financial Advisor

Mr. Talmon is a Registered Investment Advisor.

 Email Jochen

Contact a Financial Advisor

First Name *

Last Name *

Email (Optional)

Phone *

How can we help you?

Talk To Us About

Your Financial Goals

They can start with dreams or wishes, but they have an action plan behind them – something that spells out how we convert a desire into something real. That’s especially important when it comes to �nancial goals. Since they require regular investments of money and e�ort over a long period of time, you need to have workable plan to bring them to reality.

About Us

We are an independent and locally owned registered investment advisory �rm in Tulsa, OK. With diverse backgrounds, our team of eight has over 100 years of combined experience.

Useful Links

- Home
- About Us
- Strategies
- Meet Team

Contact Us

Submit Now

A Goal Without A Plan Is Just A Wish. Schedule a Free Consulation.

Get in Touch

Secure File Upload

 Address :

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