ALLEN CAPITAL MANAGEMENT
ALLEN TRUST COMPANY

ALLEN CAPITAL MANAGEMENT

REGISTERED INVESTMENT ADVISOR

a sister company of Allen Trust Company (https://www.allentrust.com)

CLIENT PORTAL (/CLIENT-PORTAL)

> Let us concentrate on your wealth management, so you focus on what matters to you most.

— Julie C. Bryan

OUR STORY

In the summer of 2000, Stuart B. Allen founded Allen Trust Company as the first trust-only bank in Oregon. As the company grew, Stuart realized we could also provide local, personal investment management services for non-trust clients.

Allen Capital Management is a Registered Investment Advisor with the SEC and regulated by the federal government. We believe in disciplined and independent investment analysis, diversification and strategic asset allocation. Using independent research, we manage your assets to meet your cash flow and growth objectives, and to dovetail with your tax, retirement and estate planning strategies. Moreover, at your direction, we can develop a plan of action that avoids investments inconsistent with your social and personal beliefs.

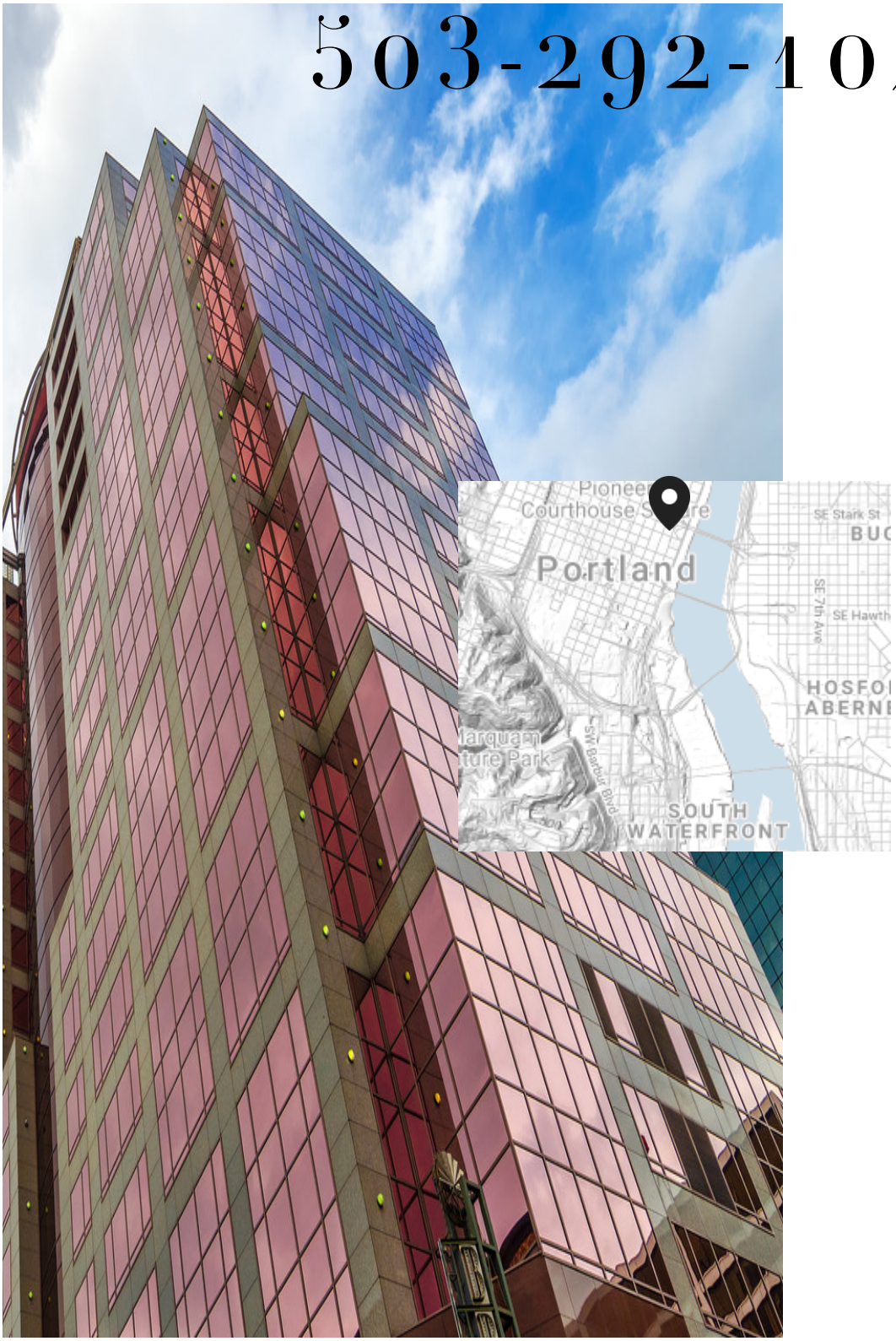
While others may use the same formula for all their client portfolios and use their access to you to sell financial products, our approach is different. We never make commissions by selling mutual funds or other products to our clients. Our ***only*** source of revenue is the fees we receive directly from our clients.

Allen Capital Management and Allen Trust Company are two companies that share the same office space and personnel (https://www.allentrust.com/team).

If you are interested in more information about trust administration, financial planning and tax services please visit our sister company, Allen Trust Company (https://www.allentrust.com).

Let us help you simplify your financial life!

503-292-1041


Portland
SE Stark St
SE 7th Ave
SW Barbur Blvd
SOUTH
WATERFRONT

INVESTMENT PHILOSOPHY

The time we take gaining a thorough understanding of your financial situation, your tolerance for risk, and your investment goals is the most valuable we spend. It helps us to create an investment plan and portfolio tailored to your needs. Then we personally and periodically review your portfolio to ensure it continues to be appropriate to your situation over time.

We believe in disciplined and independent investment analysis, diversification, and strategic asset allocation.

Strategic asset allocation, rather than market timing, has a greater influence on investment returns over long periods. We allocate your portfolio among various asset classes, such as stocks, bonds, real estate, and cash. We then diversify within the selected asset classes to gain exposure to numerous sectors, market capitalizations, and economies.

Strategic asset allocation and diversification are essential to minimizing client vulnerability to market volatility. Overall portfolio behavior is monitored to ensure it remains consistent with your tolerance for risk. Our goal is to construct a portfolio that speaks to *your* particular needs.

Using independent research, we manage your assets to meet your cash flow and growth objectives, and to dovetail with your tax, retirement, and estate planning alike. Moreover, at your direction, we can develop

strategies that avoid investments inconsistent with your social and personal beliefs. Others may use the same formula for all portfolios and use their access to you to sell financial products. Our approach is different. We custom fit your portfolio to you.

You can count on easy-to-read and accurate statements, and you can securely access your account here at our Web site.

CONTACT US

Name *

First Name

Last Name

Phone

(###)

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Email Address *

Message *

SUBMIT

ALLEN CAPITAL MANAGEMENT

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