



# OAKMONT CAPITAL

## Management, LLC

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### Investment Management

Managed portfolios designed to meet the stated return objectives of institutions and high net-worth individuals.



### Institutional Consulting

Investment programs for corporate retirement plans, charitable entities, and public funds.



### Family Office

Family wealth management for current and future generations in relation to business and philanthropic initiatives.

## Our Firm

Oakmont Capital Management, LLC is an independent, registered investment advisor. As our name suggests, we are headquartered in Oakmont, PA. We are not a subsidiary or business unit of another company and are owned outright by our individual members. We seek to establish open and transparent relationships with institutions and individuals who have investable assets in the range of \$1 million to \$500 million.

As an investment advisor, we do not sell any products or securities for a commission or sales charge. This self-imposed restriction permits us to provide what is believed to be balanced and unbiased investment advice.

Our portfolio construction process relates return objectives to risk tolerances while taking into account client considerations. The approach can accommodate the use of different products and securities. This permits us a significant amount of flexibility [...]

## Resources

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### Secure Document Upload

To send us a confidential document, please use our secure document portal. It can be found [here](#). Once your document is uploaded, it can be easily retrieved by one of our team members.

### Form ADV

Oakmont Capital Management, LLC is a registered investment adviser. For your convenience, we have posted our [Firm ADV](#) and [Privacy Policy](#). Please call us with any questions (844)-376-4244.

### Mobile App

Through the Oakmont Capital Mobile app, you can stay connected to your portfolio with your smart phone or tablet. To download the app, please follow these [instructions](#).

Oakmont, PA  
Main Office  
655 Allegheny Avenue  
Oakmont, PA 15139

Phone: (412) 828-5550  
Fax: (866) 645-8396

Contact Us!

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Naples, FL

999 Vanderbilt Beach Road

Suite 200

Naples, FL 34108

Phone: (239) 325-3354

Fax: (866) 645-8396

Greensburg, PA

500 Rugh Street

Suite 150

Greensburg, PA 15601

Phone: (724) 468-3545

Fax: (866) 645-8396

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