

*Learn about*

# Who We Are & What We Do At CIA

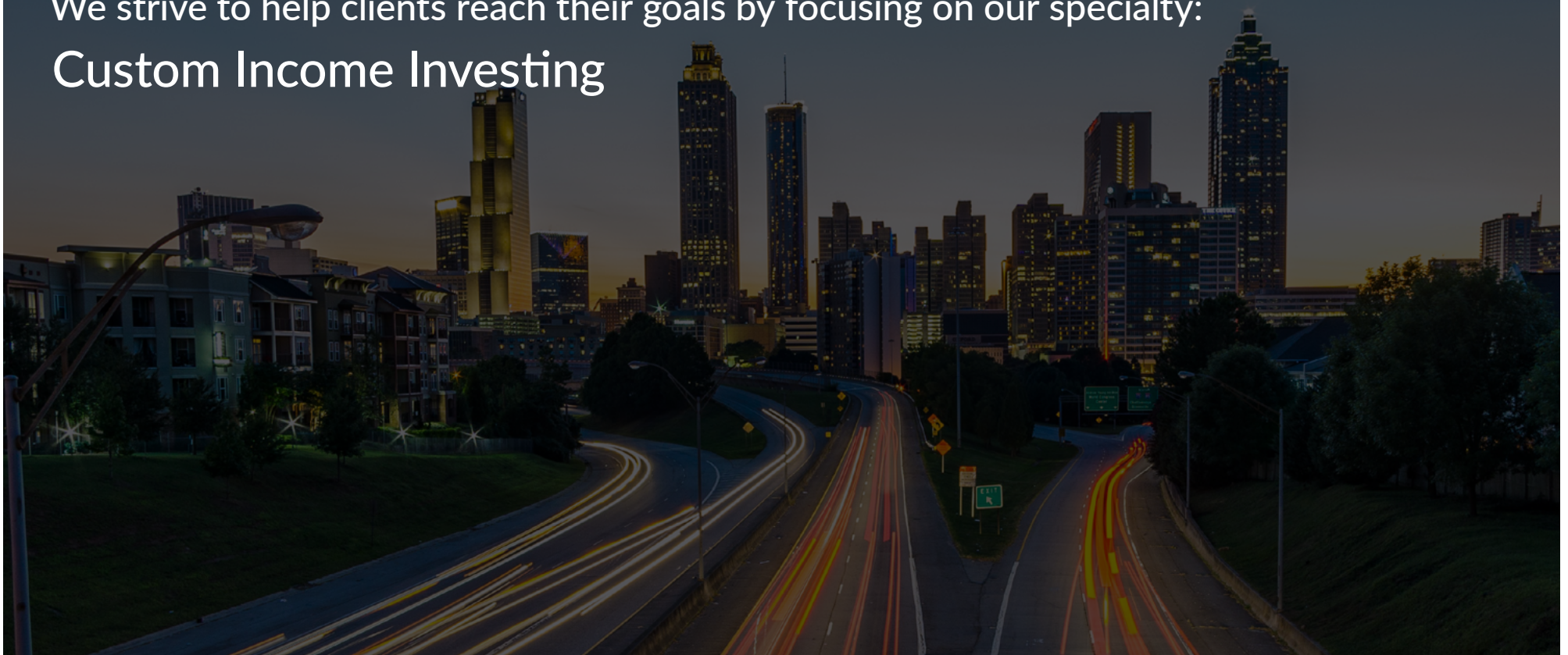


CAPITAL  
INVESTMENT  
*Advisors*

We're a family owned and operated company, headquartered in Atlanta. Since 1996, Capital has provided clients with financial strategy and management tailored to the client's individual circumstances and objects. Today, we're working with over 3,000 families across the United States, and have offices in Atlanta, Tampa, Denver and Phoenix.

We strive to help clients reach their goals by focusing on our specialty:

**Custom Income Investing**





Capital Investment Advisors  
client portfolios are custom  
tailored to meet your risk  
tolerance, income needs, time  
horizons and overall objectives.

Portfolios are typically managed  
with a blend of both income- and  
growth-oriented investments.



# Our Investment Committee



Chief Investment Officer leads team of 20 Portfolio Managers to guide allocation decisions.



Advisors use the research and insight of our in-house investment team to optimize the client's custom portfolios to help work towards the client's retirement goals.



## *Research*

The investment team keeps a pulse on what could impact our clients by delving into the latest market and economic movements on a daily basis.



## *Collaboration*

The investment committee meets every other week to digest the research and insights from the investment team. This typically prompts open and frank discussions.



## *Distribution*

While this information is primarily used internally by our portfolio managers, when pertinent, it is also shared with clients to keep them abreast of changes in the investment world.



*We are*  
Available  
For You



Call.

888.274.1906



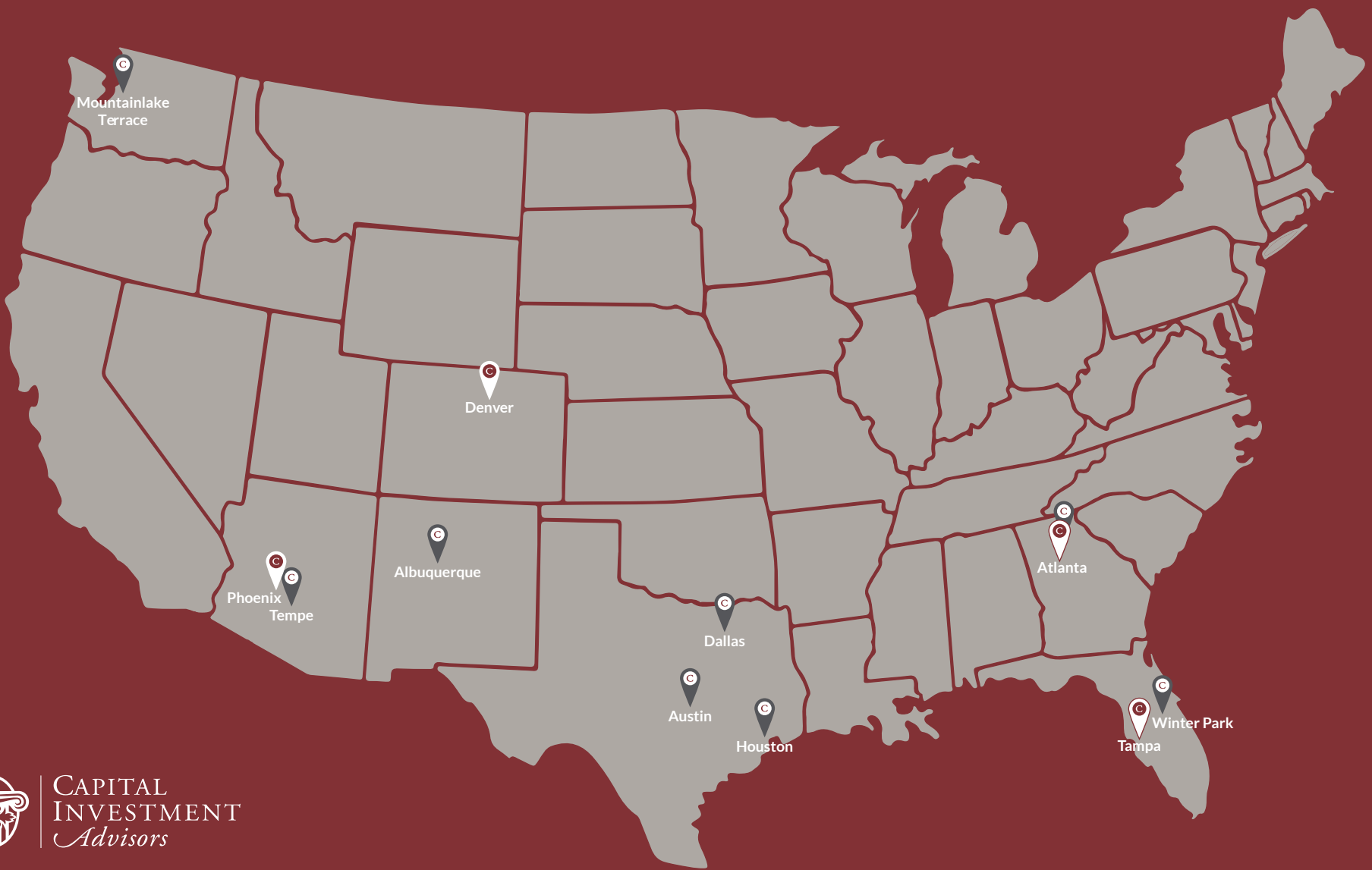
Email.

[mclark@yourwealth.com](mailto:mclark@yourwealth.com)



CAPITAL  
INVESTMENT  
*Advisors*





**CAPITAL  
INVESTMENT**  
*Advisors*

### *📍 Office Locations*

**Atlanta**  
10 Glenlake Pkwy. NE, North Tower, Suite 1000  
Atlanta, GA 30328

**Denver**  
16 Inverness Drive E, Suite 204  
Englewood, CO 80112

**Tampa**  
2502 N Rocky Point Drive, Suite 675  
Tampa, FL 33607

**Phoenix**  
2415 East Camelback Road, Suite 700,  
Phoenix, AZ 85016

### *📍 Meeting Locations*

**Atlanta**  
1100 Peachtree St NE, Suite 690  
Atlanta, GA 30309

**Dallas**  
Legacy Town Center, 6860 N Dallas Pkwy, Suite 200  
Plano, TX 75024

**Tempe**  
Wells Fargo Plaza, 64 E Broadway Rd, Suite 200  
Tempe, AZ 85282

**Albuquerque**  
500 Marquette Ave NW, Suite 1200  
Albuquerque, NM 87102

**Houston**  
5444 Westheimer, Suite 1000  
Houston, TX 77056

**Winter Park**  
941 West Morse Blvd, Suite 100  
Winter Park, FL 32789

**Austin**  
Plaza 7000, 7000 N Mopac Expy #200  
Austin, TX 78731

**Mountainlake Terrace**  
Redstone Corporate Center, 6100 219th St SW,  
Suite 460-480  
Mountainlake Terrace, WA 98043

This information is provided to you as a resource for informational purposes only and should not be viewed as investment advice or recommendations. This information is being presented without consideration of the investment objectives, risk tolerance, or financial circumstances of any specific investor and might not be suitable for all investors. This information is not intended to, and should not, form a primary basis for any investment decision that you may make. Always consult your own legal, tax, or investment advisor before making any investment/tax/estate/financial planning considerations or decisions.

