

Learn about

Who We Are & What We Do At CIA

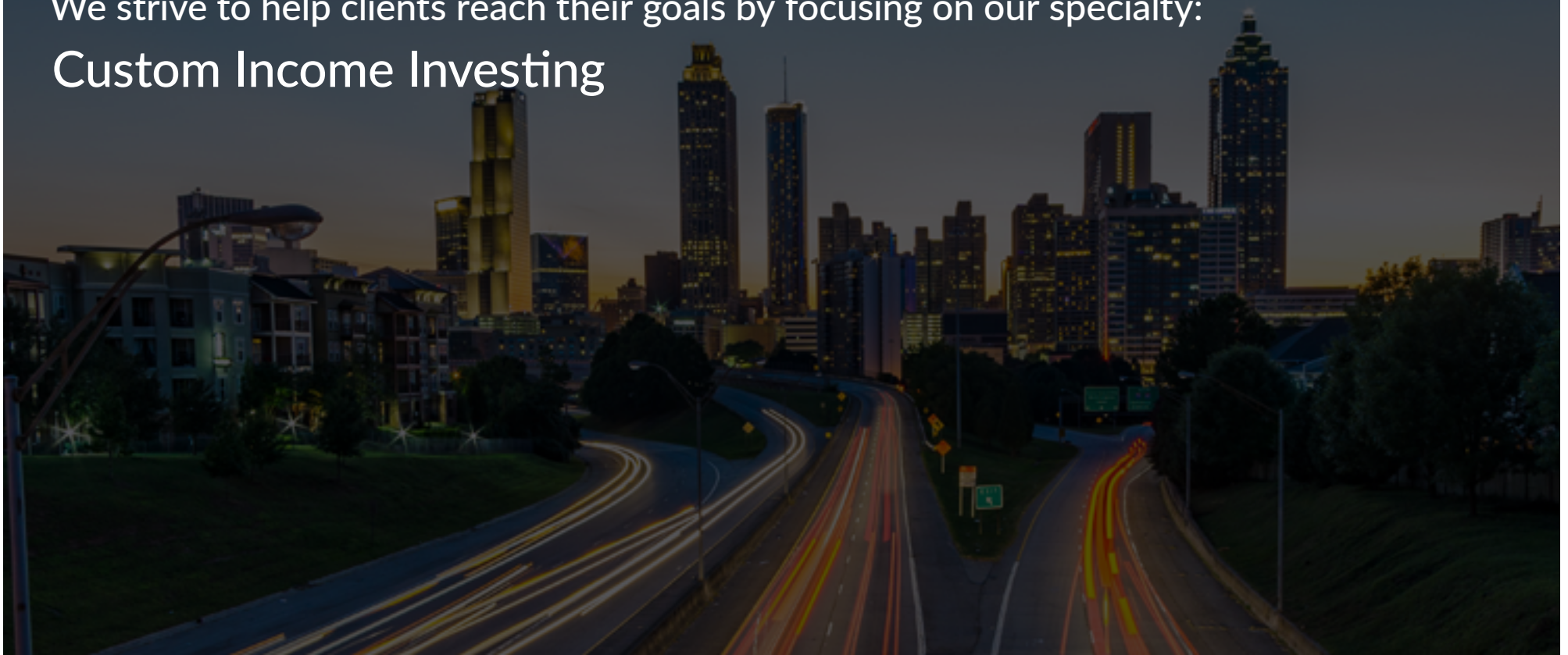


CAPITAL
INVESTMENT
Advisors

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



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📍 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
2141 E Camelback Road, Suite 205
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

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

Houston
5444 Westheimer, Suite 1000
Houston, TX 77056

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

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

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

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