

*Learn about*

# Who We Are & What We Do At CIA



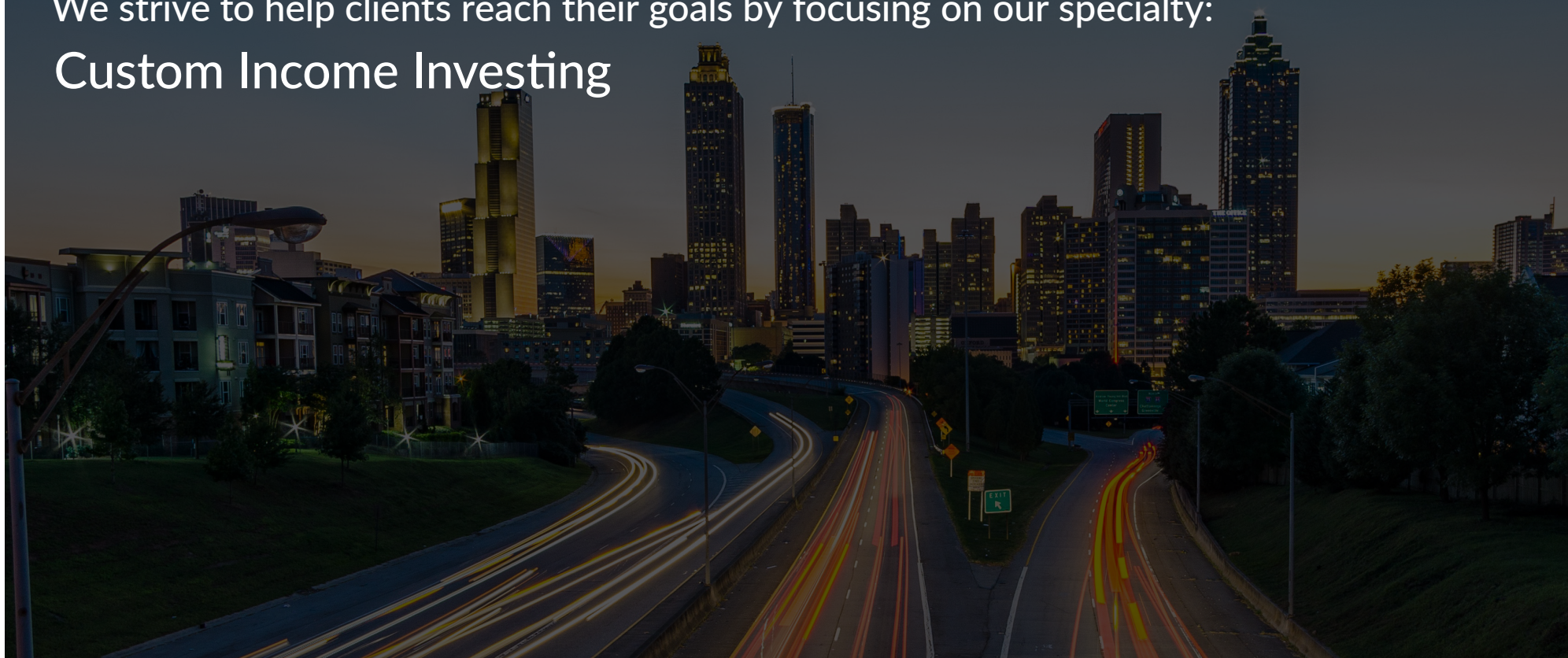
CAPITAL  
INVESTMENT  
*Advisors*



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 objectives. 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 and designed 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 consistently delving into the latest market and economic movements.



## *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.

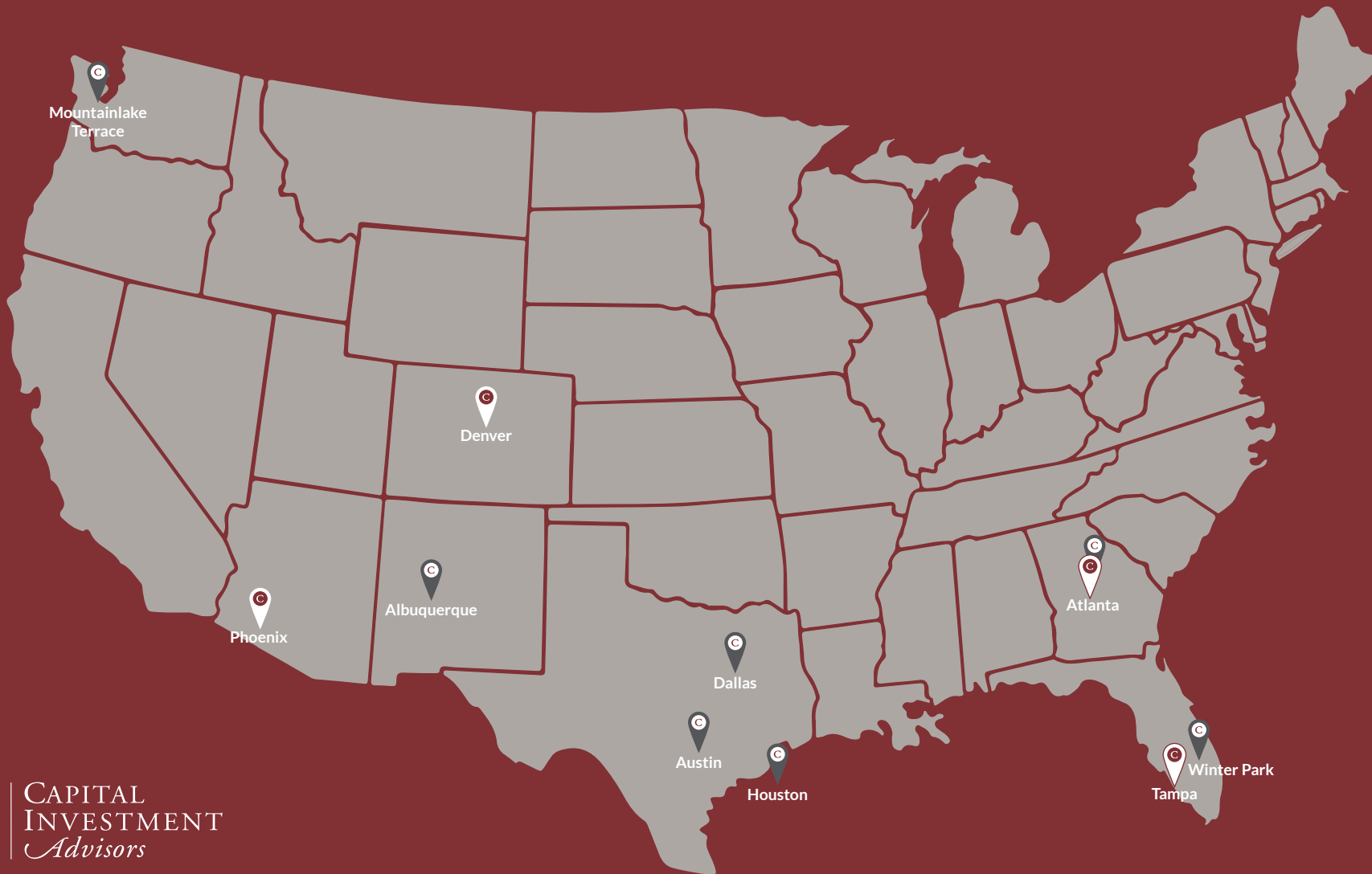
[mclark@yourwealth.com](mailto:mclark@yourwealth.com)



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## *Office Locations*

### **Atlanta**

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

### **Denver**

8101 E. Prentice Avenue, Suite 1000  
Greenwood Village, CO 80111

### **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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