

Disciplined Investors, L.L.C. provides investment management and advice for individuals, retirement plans and trusts. Founded in 1999, we specialize in offering advice that is objective and independent.

As a fee-only advisor, Disciplined Investors has the client's interests in mind with no incentive to trade frequently or purchase securities that pay higher commissions. In fact, as a Registered Investment Advisor, we have a *Fiduciary Duty* to act in the best interests of our clients. This is achieved by eliminating conflicts of interest that can be inherent under a commission-compensation approach.

### **Our Services**

We provide investment management of customized portfolios including both taxable and retirement accounts. We also help prepare retirement projections and financial plans to enable clients to understand future risks and needs. Specifically, we manage 401(k) rollovers, IRA accounts, college-savings accounts, taxable accounts and trust accounts. We also manage 401(k) investment plans for employers and their employees.

### **How We Serve You**

We partner with you to serve as your trusted advisor and to help you meet your financial goals and needs. We contribute the time, expertise, and discipline to enable you to invest successfully. We offer customized solutions and services that are individually tailored for each client. This is achieved primarily through publicly traded investments in individual stocks and bonds, mutual funds and ETFs. Additionally we can offer advice on privately held real estate investment trusts (REITS), oil and gas partnerships and direct interests in commercial and residential real estate holdings.