



January 1, 2019

**WEALTH ADVISORS, LLC**  
**Disclosures**  
**[www.wealthok.com](http://www.wealthok.com)**

**Registration**

Wealth Advisors, LLC is a registered investment adviser located in Tulsa, Oklahoma. Wealth Advisors, LLC and its representatives are in compliance with the current registration requirements imposed upon registered investment advisers by those states in which Wealth Advisors, LLC maintains clients. Wealth Advisors, LLC may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. Registration as an investment adviser does not constitute an endorsement of the firm by securities regulators nor does it indicate that the adviser has attained a particular level of skill or ability.

**Investment Advisory Services**

Investment advice can only be rendered after the following conditions are met: 1) delivery of our required regulatory disclosure statement (see below), 2) delivery of our firm's Privacy Policy, and 3) execution of an investment advisory client agreement by the client and the investment adviser representative. Any subsequent, direct communication by Wealth Advisors, LLC with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. Past investment performance is not indicative of future returns and there is a risk of loss as well as gain. Investments may lose value.

**Confidentiality Policy**

Wealth Advisors, LLC is committed to safeguarding the confidential information of our clients. We hold all personal information provided to our firm in the strictest confidence. We recognize that clients trust us with their personal information and with this trust comes a responsibility to maintain the confidentiality of that information. We take this responsibility very seriously.

To conduct regular business, we may collect non-public personal information from sources such as on applications, questionnaires, statements, or other forms provided to us by our clients. As Wealth Advisors, LLC shares non-public information solely to service our client accounts, we do not disclose any non-public personal information about our clients or former clients to anyone, except as permitted and/or required by law. Wealth Advisors, LLC representatives, affiliated persons, and employees are bound by strict confidentiality agreements and any misuse of client information will be grounds for disciplinary action up to and including termination.

At times, we may disclose non-public personal information to non-affiliated third parties. We may disclose non-public personal information about our clients to Charles Schwab and Co., Inc. as custodian in order to maintain our clients' accounts. With a client's prior authorization and on their behalf, we may disclose non-public personal information to various financial services providers such as attorneys, accountants, banks, mortgage lenders, insurance companies, etc. We may also disclose non-public personal information about our clients to service providers that assist us with information systems management, account reconciliation and reporting services, and secure document retention, destruction, and storage to facilitate our normal business operations.

**Additional Information**

A more detailed description of the Adviser and its business practices are available in the firm's Form ADV Part 2, available by contacting Wealth Advisors, LLC or at the SEC's Investment Adviser Public Disclosure website: **[www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

You may also contact the Oklahoma Department of Securities at: **[www.securities.ok.gov](http://www.securities.ok.gov)**