

Delivering High-Quality Service and Advice to a Select Few

Campbell Securities, LLC

Craig Campbell has always had a talent for investing. He started trading stocks when he was 14. As a young golf pro he supplemented his income through his investments, until his father suggested he swap his hobby (investing) for his profession (golf).

He then spent the next 33 years at major international investment banks before he started Campbell Securities, a privately owned, independent financial consulting group based in Midland, Texas.

The firm caters to a small, select group of successful individuals and their families to ensure they get the service and attention they deserve. By choosing to limit the number of families it partners with, Campbell Securities can focus on the unique complexities to each relationship it serves. And being independent allows it to provide unbiased advice without the restrictions of a major Wall Street bank.

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– Craig Campbell

“We don’t overload ourselves with a lot of accounts that we can’t service. We are sensitive to that,” Campbell

says. “We spend little time prospecting for new clients. We spend most of our time working for our existing clients and their related entities. We really do make the entire process personalized and individualized.”

Dynamic Investment Process

Campbell’s dynamic investment process tracks 13 accepted fundamental, technical and sentiment indicators on a weekly basis. Each indicator is given a rating, then totaled to determine an overall score, which is then used to determine a specific, personalized allocation for each client based on his or her risk tolerance and investment policy.

Contrarian investors by instinct, the advisors at Campbell Securities are always on the lookout for undervalued assets. But exotic investments, such as those that caused the global financial crisis, are definitely not part of the mix. The main goal is preservation of capital and maintaining what the company calls “global purchasing power.”



Back, from left: Sam Segundo, Marcel Campos, Craig A. Campbell, Braden Schaffner. Seated: Juli Jefferson.

“Most of our clients are not looking to hit a home run,” Campbell says. “They want to make sure they don’t lose global purchasing power. That’s something we’ve been preaching since the 1990s.”

“People hit home runs from time to time,” he adds. “They catch a trend and look unbeatable. But then they run right into the ditch when the correction comes. That’s typically when we shine.”

Campbell says he “loves helping people make money.” But what he likes even more is helping them “avoid the emotional mistakes that we all make from time to time. This is a business of mistakes. Whoever makes the less damaging mistakes usually is the winner.”

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