Oklahoma Wealth Management Firm Marks 30 Years of Impact

ChappelWood Financial Services marks a milestone anniversary, reflecting on the families and communities they have served.



Victoria Woods, CEO of ChappelWood Financial celebrates 30 years of impact.

EDMOND, OK, UNITED STATES, September 9, 2026 /EINPresswire.com/ -- ChappelWood Financial Services is celebrating 30 years in business, marking three decades of helping Millionaire families across the United States plan for retirement, build financial confidence and protect the legacies they have worked hard to create.
Founded by Victoria Woods, CEO and Chief Investment Advisor, ChappelWood has grown from a local financial advisory firm into one of Oklahoma's most recognizable woman-owned wealth management companies.

For Woods, the 30-year milestone represents much more than business longevity.
"Thirty years is a tremendous blessing, and it is also a responsibility," said Woods. "When I look back, I see employees who showed up, clients who trusted us with the things that mattered most, families who allowed us into their financial lives, partners who stood beside us, and people who created our unique culture and high standards, some of whom have passed on. This anniversary belongs to every person who helped make ChappelWood stronger, wiser, and more committed to Premier service, the ChappelWood way."

Based in Edmond, OK, ChappelWood has built its approach around helping Millionaires address the many financial decisions that come with retirement and long-term wealth planning. The firm works with high-net-worth families, retirees, business owners and individuals across the United

States, with a focus on wealth preservation, retirement income, tax strategies and legacy planning.

Today, the company continues to build on that legacy through its team of financial professionals and community leaders. In addition to Woods, the ChappelWood team includes Damon King, CFP®, Managing Partner; Meg Weist, Director of Client Services; Leah Jolliff, First Impression Manager and Camille Smith, Executive Assistant to the CEO.

“As I’ve said many times, Victoria and her team are worth their weight in gold,” said Gayle Hodges, a long-time ChappelWood client living in Palm Springs, CA. “My husband and I joined ChappelWood more than 20 years ago. When he passed, a lot of my female friends said I should hire a new advisor. I told them, ‘Maybe your advisor doesn’t know how to work with women, however, I’ve got The Financial Diva in my back pocket!’”

King, who joined the firm in 2014, echoes those sentiments.

"Financial planning is never just about numbers on a page,” King said. “It is about people. Every family has a story. Our responsibility is to help bring those pieces together and help the client focus on what matters.”

Over the years, ChappelWood has become known not only for its work with clients, but also for innovation and philanthropy.
Woods was the visionary founder behind the Financial District of Oklahoma in Edmond, creating a place where financial professionals and related services could collaborate to serve clients more comprehensively. The concept earned Woods a Journal Record Innovator of the Year Award in 2002.

The firm earned AssetMark’s inaugural Community Inspiration Award for its charitable work with local non-profits in 2015 and again in 2016, making it the first multi-year recipient.

ChappelWood’s commitment to financial education solidified in 2016 with the founding of ChappelWood University, the firm’s educational initiative designed to demystify complex financial concepts to help families make better decisions. Led by King, ChappelWood University has reached more than 3,000 people across the United States through unique courses including Surviving Retirement, Disinheriting Uncle Sam, and Wills, Trusts, & Your Money.

“ChappelWood University’s true purpose is to help people realize they don’t need a degree in finance or economics to make savvy financial decisions,” said King. “Literally anyone can use the basics of financial education to grow wealth and live comfortably in retirement.”

ChappelWood’s 18-year partnership with a wealth management firm managing approximately $180 billion in assets has been vital to its growth. Woods has served as an Advisory Board member, RIA member and currently serves on the AI board for that partner, contributing to a

relationship that has supported the firm's ability to provide informed guidance and comprehensive wealth management resources.

As ChappelWood enters its fourth decade, the firm remains focused on its guiding principles: put people first, lead with integrity, and serve with humility and compassion.

"Thirty years gives us a reason to celebrate, although it also reminds us, were just getting started!" Woods said. "There are more families to serve, more conversations to have, more businesses to help protect. We are grateful for what has been built, and we are ready for what comes next."

ChappelWood Financial Services is located in the Financial District of Oklahoma at 1725 E. 15th St. in Edmond.

About ChappelWood Financial Services

ChappelWood Financial Services is an Edmond-based wealth management firm serving high-net-worth families, retirees and business owners. Founded in 1996, the firm provides customized strategies focused on wealth preservation, retirement income planning, tax minimization and estate and legacy planning. ChappelWood is celebrating 30 years of serving Oklahoma clients and communities in 2026.
For more information, visit ChappelWood.com.

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