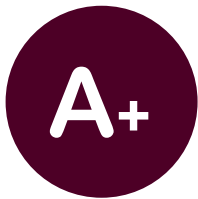




are you classified?

Many financial advisors classify clients based on portfolio size:



\$4 million at the firm

- Tax documents hand-delivered
- 3+ in-person quarterly reviews
- Invited to client appreciation events



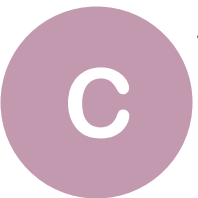
\$2 million at the firm

- Tax documents personally emailed
- 2 in-person quarterly reviews
- Invited to client appreciation events



Has “A client” value outside the firm

- Tax documents emailed
- 2 in-person quarterly reviews
- No client appreciation events



\$500,000 minimum, cannot grow to “A client”

- Tax documents mailed
- 1 in-person review, 1 phone call
- No client appreciation events

At Adams Financial Concepts we do not classify our clients based on the size of their account. **We** believe if a client comes to us with \$500,000, we have a responsibility to help them grow their account to \$4 million or more over the longer-term.

We cannot guarantee this, but it is our goal!

What kind of treatment do you receive from your financial adviser?