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ASSOCIATES

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Financial and Insurance Services, Fiduciary

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EMPOWERING PARENTS · COACHING ATHLETES

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Long-Term Care Solutions

CM3 DATA ENTRY SERVICES

ONE WORLD
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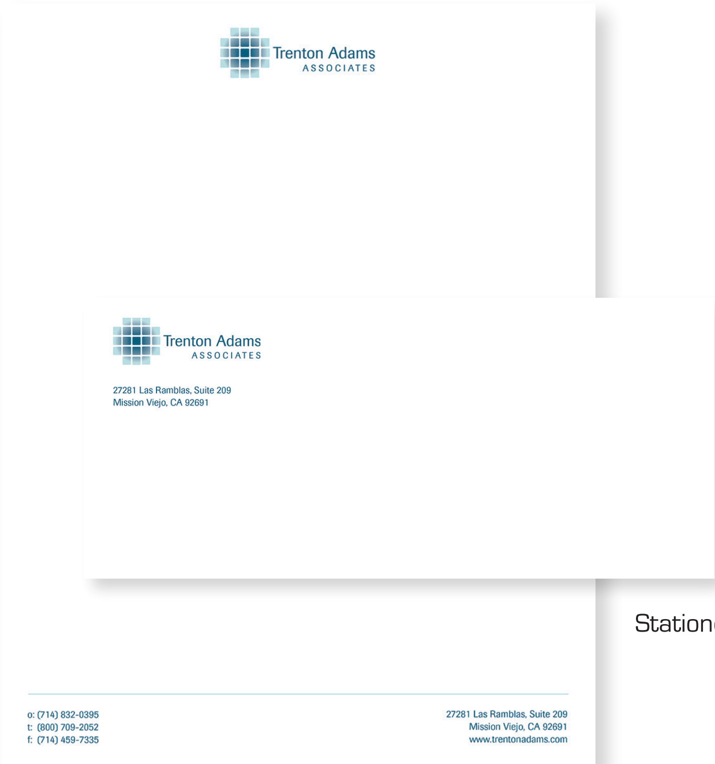


Social Media Banner

Stationery

Trenton Adams Associates offers clients comprehensive and values-based financial planning through customizable solutions and industry expertise.

Trenton Adams Associates encourages their clients to ask themselves:
I have investments, but what do they mean for my future?
I have goals, but do I have accountability?
I have advisors, but do they work together?

Our approach to financial planning is based on decades of experience and our clients' own financial habits and needs; we advise our clients to do what they themselves would likely do if they had the time and expertise to manage their entire financial portfolio. We tailor our solutions to suit each client and develop a plan that is designed exclusively for each individual or family.

We work together to discover the values that will drive their financial plan. We then set specific and measurable goals to create an effective plan that is tailored to their values, goals, and vision. Finally, we coordinate a team of vetted subject matter skilled professionals to help each client get on track and stay on track.

Contact us to find out how we can design a custom plan for your financial goals and desired financial future. We will embrace your vision as we complement your plan with our array of practicable solutions. We want to add value to your life; to that end we invite you to come in so we can get acquainted and design a plan that is poised for your financial success.

Launched in 2002, Trenton Adams Associates was founded and is managed by Trent Adams, a leading financial planner in Orange County with twenty years of experience helping clients find financial success. The company works with individuals by getting to know each one personally and by developing and implementing a customized plan to achieve their goals for the reasons that matter to them. Trenton Adams Associates provides clients with financial solutions that are comprehensive and coordinated.

Trenton Adams Associates takes a comprehensive and values-driven approach to serving its clients. The company places a strong emphasis on specifying client goals, implementing a plan to achieve them in accordance with their schedule, and both encouraging and holding clients accountable for their part in the plan. In this way, clients obtain a plan that gives them a high probability of getting where they want to go.

As a leading financial services provider in the Orange County region, Trenton Adams Associates invites clients to meet for an initial consultation.

What We Offer

Trenton Adams Associates approaches financial planning through its comprehensive and coordinated process. We arrange the complexities of every financial portfolio with transparent simplicity so that our clients know precisely where they are and where they are going. We provide skilled, experienced-based advice for money matters, taxes, estate planning, real estate lending, bookkeeping, property/casualty insurance, life insurance, and any other area that falls within the spectrum of financial planning.*

Our brand of financial planning is client-specific. We examine your financial picture to determine solutions that will help you achieve your goals. There is no one-size-fits-all solution when it comes to financial planning. We know nothing less will do than a plan that is tailor-made for each client and their goals. Our services are designed to integrate seamlessly into a financial plan that is results-based and grounded upon our best practices. There is no reason to unravel the complexities of financial planning and management on your own when we're here to help.

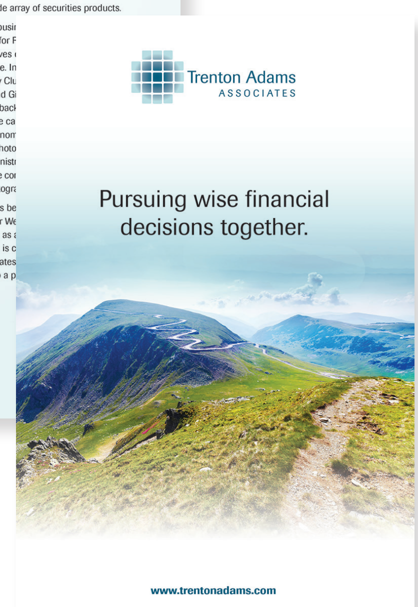
A Comprehensive, Coordinated Process

We work together to create a comprehensive financial plan that gives you the highest probability of achieving your goals. We engage a process of coordinating various disciplines to create a sound financial house.

**Trent Adams does not give tax or legal advice but works with professionals who do.*

Trent Adams

Trent Adams has advised clients and helped them meet their financial goals for twenty years. His approach to financial success is client-centric. By getting to know his clients and their habits as well as their goals, he is able to help them develop a plan to achieve their desired outcome. As Principal of Trenton Adams Associates, Trent has helped a myriad of clients reach their financial dreams. Before launching his own company, Trent was a financial consultant for both Lincoln Investment Planning and Merrill Lynch. He is licensed to implement client plans with a wide array of securities products.



Brochure

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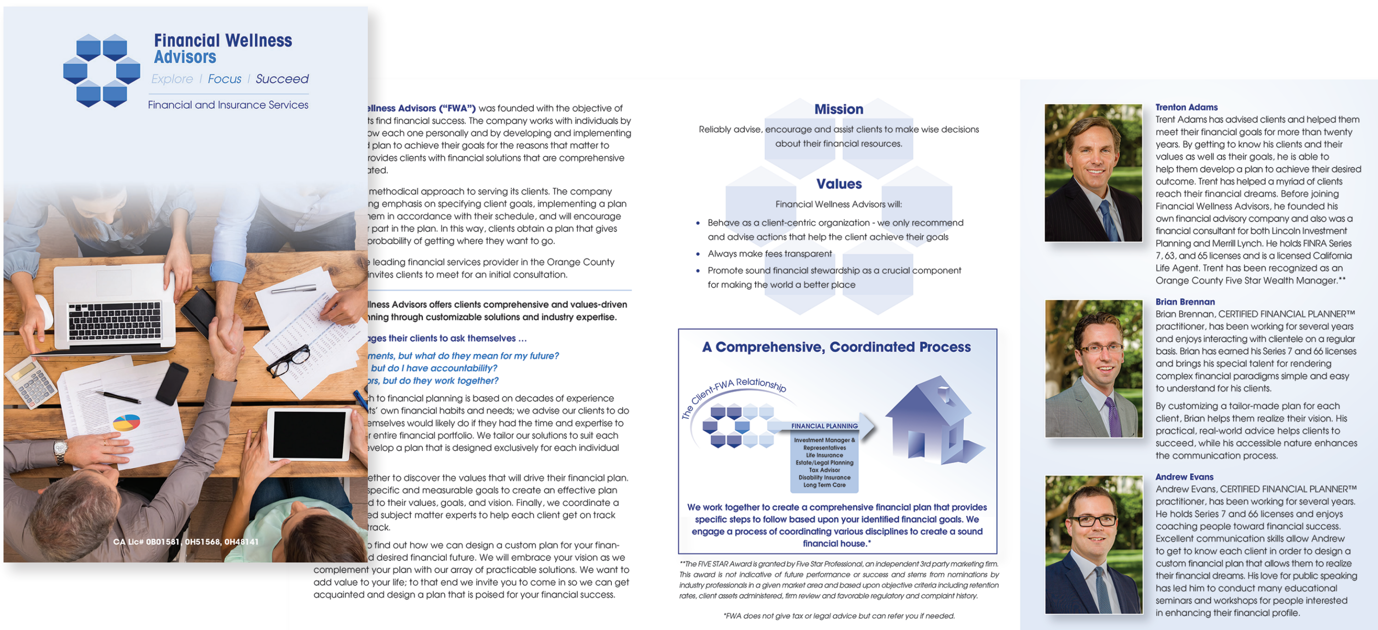

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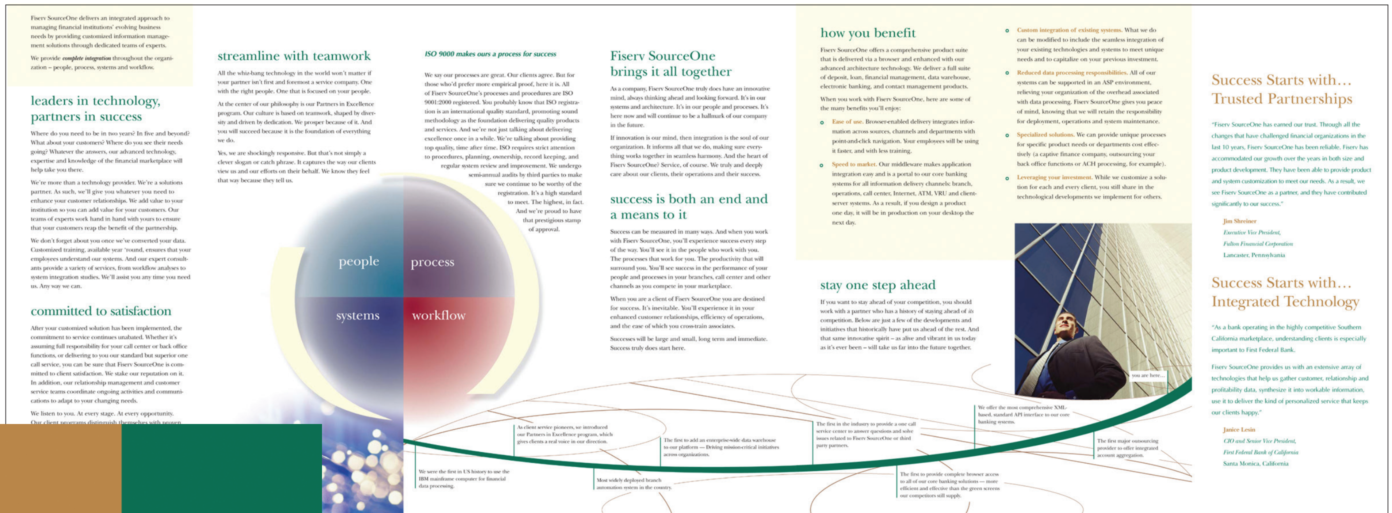

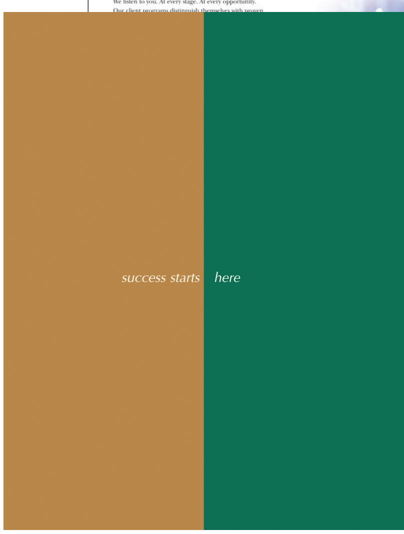

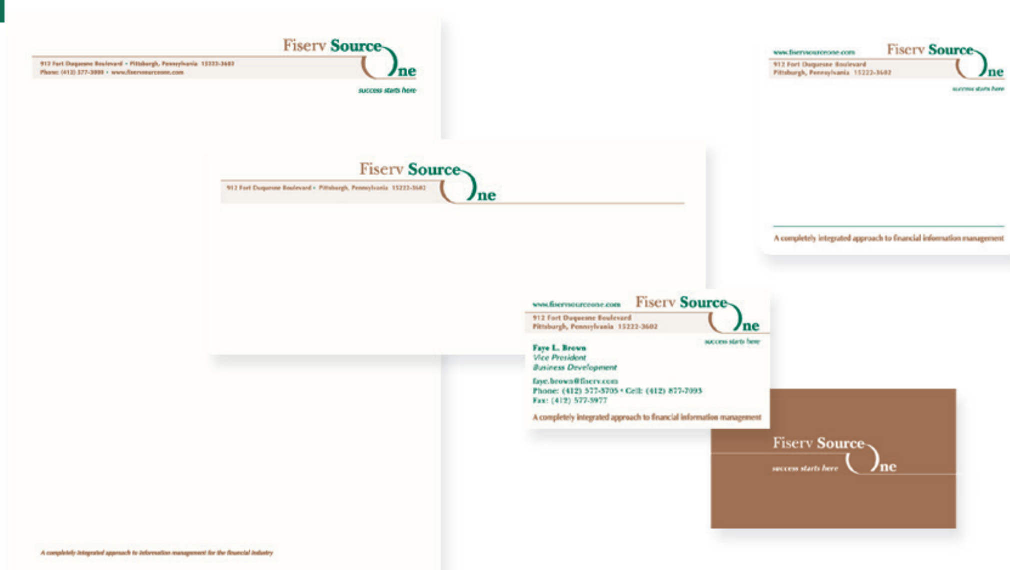

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