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27281 Las Ramblas, Suite 209  
Mission Viejo, CA 92691



**Trenton G. Adams**  
Trusted Advisor  
Registered Representative  
of GWN Securities, Inc.

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Securities offered through GWN Securities Inc. Member FINRA, SIPC  
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27281 Las Ramblas, Suite 209  
Mission Viejo, CA 92691  
www.trentonadams.com

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, experience-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.

Along with his busy board member for F Global) and serves i Audit Committee. In Anaheim Rotary Cl, like the Boys and G College, Sacredhood International. He ca causes and econor regularly as a photo Church PICS Minis from helping the co passion for photogr Trent Adams has be County Five Star We ethic and talent as i company which is c realize their greats and adhering to a p



Pursuing wise financial decisions together.



Brochure

# Financial Samples

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## Financial Wellness Advisors

Explore | Focus | Succeed

Financial and Insurance Services

Financial Wellness Advisors ("FWA") was founded with the objective of helping individuals find financial success. The company works with individuals by analyzing each person's personality and by developing and implementing a plan to achieve their goals for the reasons that matter to them. FWA provides clients with financial solutions that are comprehensive and tailored to their needs.

FWA's methodical approach to serving its clients. The company emphasizes specifying client goals, implementing a plan in accordance with their schedule, and will encourage each client to be an active participant in the plan. In this way, clients obtain a plan that gives them a high probability of getting where they want to go.

FWA is the leading financial services provider in the Orange County area and invites clients to meet for an initial consultation.

Financial Wellness Advisors offers clients comprehensive and values-driven financial planning through customizable solutions and industry expertise.

Financial Wellness Advisors asks their clients to ask themselves ...  
 "What do I want, but what do they mean for my future?  
 But do I have accountability?  
 Yes, but do they work together?"

Financial planning is based on decades of experience and understanding of each client's 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 do so for their values, goals, and vision. Finally, we coordinate a plan that is designed exclusively for each individual client.

Financial Wellness Advisors helps clients discover the values that will drive their financial plan. We help clients set specific and measurable goals to create an effective plan that aligns with their values, goals, and vision. Finally, we coordinate a plan that is designed exclusively for each individual client. We work with subject matter experts to help each client get on track.

Financial Wellness Advisors helps clients find out how we can design a custom plan for your 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.

CA Lic# 0801541, 0801546, 0801941

### Mission

Reliably advise, encourage and assist clients to make wise decisions about their financial resources.

### Values

Financial Wellness Advisors will:

- Behave as a client-centric organization - we only recommend and advise actions that help the client achieve their goals
- Always make fees transparent
- Promote sound financial stewardship as a crucial component for making the world a better place

### A Comprehensive, Coordinated Process



We work together to create a comprehensive financial plan that provides specific steps to follow based upon your identified financial goals. We engage a process of coordinating various disciplines to create a sound financial house.\*

\*The FIVE STAR Award is granted by Five Star Professionals, an independent third party marketing firm. This award is not indicative of future performance or success and differs from nominations by industry professionals in a given market area and based upon objective criteria including selection rates, client assets administered, firm review and favorable regulatory and complaint history.

\*FWA does not give tax or legal advice but can refer you if needed.



#### Trent Adams

Trent Adams has advised clients and helped them meet their financial goals for more than twenty years. By getting to know his clients and their values as well as their goals, he is able to help them develop a plan to achieve their desired outcome. Trent has helped a myriad of clients reach their financial dreams. Before joining Financial Wellness Advisors, he founded his own financial advisory company and also was a financial consultant for both Lincoln Investment Planning and Merrill Lynch. He holds FINRA Series 7, 63, and 65 licenses and is a licensed California Life Agent. Trent has been recognized as an Orange County Five Star Wealth Manager.\*\*



#### Brian Brennan

Brian Brennan, CERTIFIED FINANCIAL PLANNER™ practitioner, has been working for several years and enjoys interacting with clientele on a regular basis. Brian has earned his Series 7 and 66 licenses and brings his special talent for rendering complex financial paradigms simple and easy to understand for his clients.

By customizing a tailor-made plan for each client, Brian helps them realize their vision. His practical, real-world advice helps clients to succeed, while his accessible nature enhances the communication process.



#### Andrew Evans

Andrew Evans, CERTIFIED FINANCIAL PLANNER™ practitioner, has been working for several years. He holds Series 7 and 66 licenses and enjoys coaching people toward financial success.

Excellent communication skills allow Andrew to get to know each client in order to design a custom financial plan that allows them to realize their financial dreams. His love for public speaking has led him to conduct many educational seminars and workshops for people interested in enhancing their financial profiles.



**KRAMER FIDUCIARY SERVICES**  
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**HAVE YOU LOST YOUR TITLE COMPANY?**

Don't worry - First Merit Settlement Services is ready to serve you.

**FIRST MERIT SETTLEMENT SERVICES, INC.**

**ESTATE SERVICES**

AT REASONABLE FEES

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## KRAMER FIDUCIARY SERVICES

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### WE PROVIDE:

- Professional estate and trust services at significantly lower fees than attorneys and banks. (Most attorneys and banks take a percentage of the estate. We do not.)
- Quality, comprehensive and timely services.
- We have numerous years of estate and trust expertise.
- Income tax preparation, investment advisory, retirement and accounting services.

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**FIRST MERIT SETTLEMENT SERVICES, INC.**

WHERE TITLE MEETS TECHNOLOGY

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Fierv SourceOne delivers an integrated approach to managing financial institutions' existing business needs by providing customized information management solutions through dedicated teams of experts. We provide complete integration throughout the organization - people, process, systems and workflow.

leaders in technology, partners in success

Where do you need to be in ten years? In the end, it's about the success of your customers. Who do you see in that future? Where the success, our advanced technology, expertise and knowledge of the financial marketplace will help take you there. We're more than a technology provider. We're a solutions partner. In fact, we give you solutions you need to enhance your customer relationships. We add value to your institution so you can add value to your customers. Our team of experts work hand in hand with yours to ensure that your customers reap the benefits of the partnership. We don't forget about you since we're committed your data. Customized training, available on-site, ensures that your employees understand our systems. And our experts can also provide a variety of services, from workflow analysis to system integration studies. We'll assist you any time you need us. Any time you want.

committed to satisfaction

After your customized solution has been implemented, the commitment to service continues unabated. Whether it's answering full responsibility for your call center or back office functions, or delivering to you our standard but superior one-call service, you can be sure that Fierv SourceOne is committed to client satisfaction. We add our reputation on it. In addition, our relationship management and customer service teams coordinate ongoing activities and customer options to adapt to your changing needs. We listen to you. At every stage. At every opportunity. Our client success team is always ready to help.

streamline with teamwork

All the while, being in the world isn't enough if your partner isn't there and success is a never-ending one with the right people. One that is focused on your people. At the center of our philosophy is our Partners in Excellence program. Our culture is based on teamwork, shared responsibility and driven by dedication. We prosper because of it. And you will succeed because it is the foundation of everything we do. We're so incredibly responsive. But that's not simply a clever slogan or catch phrase. It represents the way our clients view us and our efforts on their behalf. We know they feel that way because they will.

ISO 9000 makes ours a process for success

We say our processes are great. Our clients agree. But for those who'd prefer more empirical proof, here it is. All of Fierv SourceOne's processes and procedures are ISO 9000:2000 registered. You probably know that ISO registration is an international quality standard, promoting sound methodology as the foundation for defining quality products and services. And we're not just talking about defining excellence once in a while. We're talking about providing top quality one after the other. ISO requires strict attention to procedures, planning, monitoring, record keeping, and regular review and improvement. We undergo external audits to verify that we continue to be worthy of the registration. It's a high standard to meet. The highest, in fact. And it's proof to have that previous stamp of approval.

Fierv SourceOne brings it all together

As a company, Fierv SourceOne truly does have an innovative mind, always thinking about and looking forward. It's in our system and architecture. It's in our people and processes. It's how we work with Fierv SourceOne, here are some of the many benefits you'll enjoy:

how you benefit

Fierv SourceOne offers a comprehensive product suite that is delivered via a browser and enhanced with our advanced architecture technology. We deliver a full suite of deposit, loan, financial management, data warehouse, electronic banking, and contact management products. When you work with Fierv SourceOne, here are some of the many benefits you'll enjoy:

- Ease of use. Browser-enabled delivery integrates information across sources, channels and departments with point-and-click navigation. Your employees will be using it faster and with less training.
- Speed to market. Our middleware makes application integration easy and is a prelude to our core banking systems in all information delivery channels: branch, operations, call center, Internet, ATM, VUE, and direct server system. As a result, if you design a product one day, it will be in production on your desktop the next day.
- Custom integration of existing systems. What we do can be modified to include the seamless integration of your existing technologies and systems to meet unique needs and to integrate on your previous investment.
- Reduced data processing responsibilities. All of our systems can be supported in an ASP environment, relieving your organization of the overhead associated with data processing. Fierv SourceOne gives you peace of mind, knowing that we will retain the responsibility for deployment, operations and system maintenance.
- Specialized solutions. We can provide unique processes for specific product needs or department core efficiency (a capital finance company, concerning your back office functions or A/C processing, for example).
- Leveraging your investment. While we continue to be a solution for each and every client, you will share in the technological developments we implement for others.

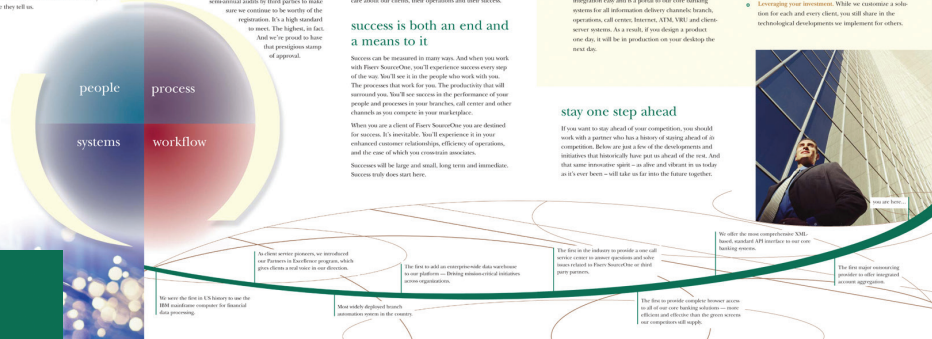
success is both an end and a means to it

Success can be measured in many ways. And when you work with Fierv SourceOne, you'll experience success every step of the way. You'll see it in the people who work with you. The processes that work for you. The productivity that will surround you. You'll see success in the performance of your people and processes in your branches, call centers and other channels as you compete in your marketplace.

When you are a client of Fierv SourceOne you are destined for success. It's inevitable. You'll experience it in our enhanced customer relationships, efficiency of operations, and the ease with which you maintain accounts. Success will be large and meaningful, long term and immediate. Success truly does start here.

stay one step ahead

If you want to stay ahead of your competition, you should work with a partner who has a history of staying ahead of its competition. In every part of the development and installation that historically have put us ahead of the rest. And that same measure spirit - an offer and release us in order as it's over - has - will take us far into the future together.



We were the first in KY history to use the IBM software company for financial data processing.

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Success Starts with... Trusted Partnerships

Fierv SourceOne has earned our trust. Through all the changes that have challenged financial organizations in the last 10 years, Fierv SourceOne has been reliable. Fierv has accompanied our growth over the years in both size and product development. They have been able to provide product and system customization to meet our needs. To make us Fierv SourceOne is a partner, and they have combined significantly to our success."

Jim Shiever  
Executive Vice President,  
Fulton Financial Corporation  
Lancaster, Pennsylvania

Success Starts with... Integrated Technology

"As a bank operating in the highly competitive Southern California marketplace, understanding clients is especially important to First Federal Bank.

Fierv SourceOne provides us with an extensive array of technologies that help us gather customer relationship and profitability data, synthesize it into valuable information, use it to deliver the level of personalized service that keeps our clients happy."

Justin Lewis  
CEO and Senior Vice President,  
First Federal Bank of California  
Santa Monica, California

success starts here



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**WE PROVIDE:**

- Professional estate and trust services at significantly lower fees than attorneys and banks. (Most attorneys and banks take a percentage of the estate. We do not.)
- Quality, comprehensive and timely services.
- We have numerous years of estate and trust expertise.
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**FIRST MERIT SETTLEMENT SERVICES, INC.**

**WHERE TITLE MEETS TECHNOLOGY**

**KFN**  
Kreiner Financial Network

*Proud to Protect Families and Futures*

**We offer freedom**

Working closely with your legal and tax advisors, we can help you reach your business and estate planning goals with strategies that will help to maximize your personal benefits, provide the resources to help protect and maintain your business, preserve assets for the benefit of your family, and create a secure retirement strategy. These strategies can help build your business and transfer wealth to future generations, meet your retirement plan in place, we continue to support you by continuing to engage in services to ensure that the plan is on track.

**Retirement Planning** – Qualified plans can help protect and compound your hard-earned money. From simple 401(k) plans to complex profit sharing, 529(k) and defined benefit plans.

**Business Continuation Strategies** – We offer sophisticated general, defined contribution, insurance, buyout, and other retirement and business continuation strategies. These plans can be used by people with financial resources and ordinary employee resources.

**Employee Benefits** – We can help you create the employee benefit package that is right for your business, including disability, dental, long-term care insurance, retirement, voluntary plans, and voluntary plans.

**Educational Services** – We can tailor solutions for your employees regarding their retirement packages, but a valuable service for the educational services of your employees.

**Key Person Insurance** – The death or disability of a key employee can create serious problems for a business. We can help you protect against the uncertainty.

**Business Succession Planning** – Our succession strategies can be tailored to your needs. Succession planning, we can provide the insurance and disability income insurance funding for a buyout agreement or ownership transfer, depending on the business. For owner who become disabled or with the family business, we can identify alternative strategies to transfer your family wealth to children – whether they are active or inactive in the family business.

**We are not about short-term incomes... we are about long-term outcomes**

We adhere to a three-step process, acknowledging your needs and goals, as well as analyzing your financial information to create a personalized wealth management approach. This process is ongoing, so that we can be assured we will cover areas with a full understanding of your personal and business goals, and transfer them over consistent communication.

**Step 1: Understanding You**  
We're glad to have you. Our first step is to understand you and your situation, and create a thorough understanding of your current financial situation. In order to offer you truly personalized services, we leverage professional advice regarding the state of the accounting and business climate. This then allows us to present strategies that are both effective and more right to you.

**Step 2: Putting It All Together**  
The professionals will gather information about you or your business, and create a thorough understanding of your current financial situation. In order to offer you truly personalized services, we leverage professional advice regarding the state of the accounting and business climate. This then allows us to present strategies that are both effective and more right to you.

**Step 3: The Recommendations**  
We understand that each person and each business is unique, and therefore, they direct challenges. Your personalized financial strategy will address the challenges that are most important to the success of your financial future.

**Step 4: Keeping them on track**  
Our philosophy does not end with the implementation of your financial strategy. We will continue to support you in meeting your evolving needs and goals in light of the changes in the investment markets, as well as, and we will be in contact with you to ensure the goals remain on the horizon, and we'll be in contact with you to ensure the strategy remains on track.