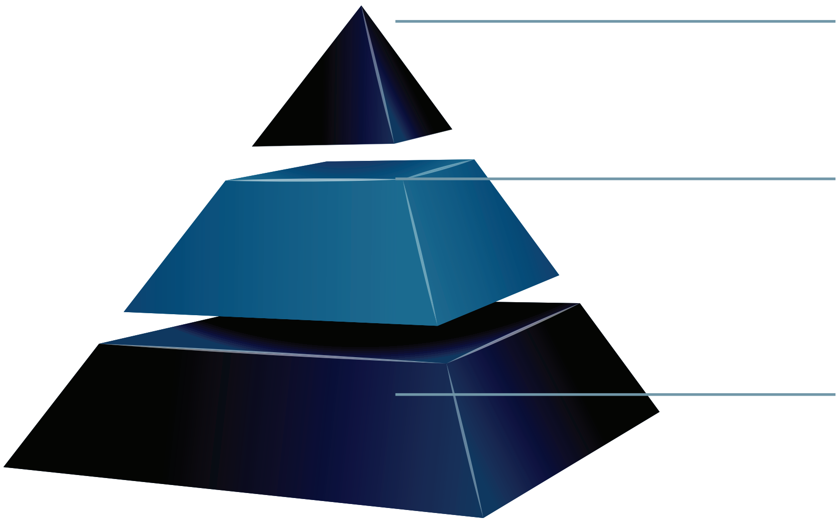
The Owner's Plan®

You created it differently than others. You need to manage it differently than others.

If you're like most first generation business owners and wealth creators you likely had a clear business plan and the discipline to follow it. The wealth you created doesn't necessarily make things easier, in fact it tends to make things more complicated. That's why our trademarked process brings the same disciplines of business planning to long-term family wealth planning and preservation.

Transitioning from managing the business to managing the family wealth enterprise requires financial clarity before strategy. With clarity comes the confidence to make wise decisions about your wealth, and Kathleen Adams can help.

Create a foundation of Financial Security & Independence before you move into the higher levels of Human and Social Capital.



SOCIAL CAPITAL & STRATEGY
Philanthropy / Using assets to benefit others

HUMAN CAPITAL
Current & Future Legacy / How human behavior will affect the family and its long term wealth preservation

FINANCIAL SECURITY & INDEPENDENCE
The Foundation of your Plan / Financial assets required to maintain desired lifestyle

Kathleen Adams, CFP® CPWA®

Kathleen is an entrepreneur who helps people who created their own businesses handle their wealth as well as they've handled their business. Her focus has always been on being a financial advocate for her clients, especially in conjunction with exit planning and family wealth transfer. She utilizes her proprietary process, The Owner's Plan®, to develop strategic personal financial plans, develop appropriate advisory teams and prepare families for the future challenges of inheriting wealth.

Kathleen is a Senior Associate with SEIA and has been a financial advisor for over 15 years. She has the CERTIFIED PRIVATE WEALTH ADVISOR® designation, delivered by Investment Management Consultants Association (IMCA) through The University of Chicago Booth School of Business. CPWA® is an advanced designation designed for financial advisors and consultants who work with high-net-worth clients on the life cycle of wealth. Its focus is on advanced wealth strategies and applied concepts.

Recently, Kathleen earned IMCA's Association's Applied Behavioral Finance Certificate enhancing her industry knowledge. Designed to address common behavioral challenges that trip up investors and advisors alike, the program includes timely and relevant presentations by behavioral finance experts, financial advisor practitioners, and cutting-edge academics.

Kathleen earned her CERTIFIED FINANCIAL PLANNER™ certification and completed the Personal Financial Planning (PFP) designation program at UCLA Extension. Kathleen received her Bachelor of Science degree from Loyola University in Chicago, graduating Magna Cum Laude. She is a licensed insurance agent in California [Insurance License #0C76833].

Kathleen Adams, CFP,® CPWA®

SEIA Clients Benefit From:

The firm's ongoing ability to observe, assess and respond to the conditions of a global economy in a proactive manner.

Manage $5.4 Billion in assets

SEIA & its affiliates manage $5.4 billion in client assets as of June 30, 2016.

SEIA was recognized in 2016:

2016 Financial Times 300 Top Registered Investment Advisors list, the 2016 Los Angeles Business Journal list of largest money management firms ranked by assets managed.