

Important Note

This presentation is for educational purposes only. Nothing we will talk about should be considered a recommendation to buy or sell any security. Many risk controlled investments are complex products and any specific product should be reviewed by you and/or your financial advisor before purchasing.

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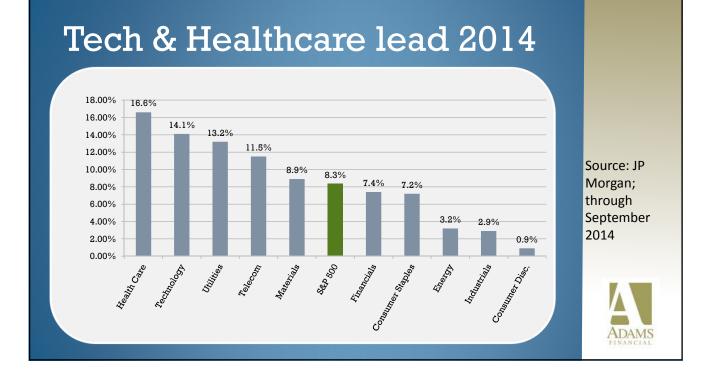


Technology and taxes are having an increasing impact on our financial picture.

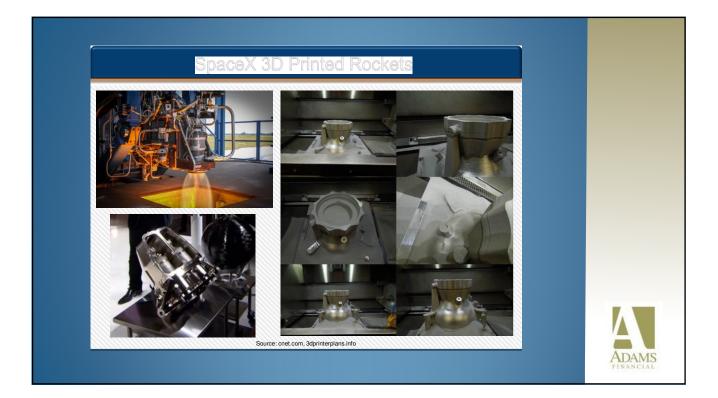
Technology Impacts..

- economy
- medical advancement
- earnings
- jobs
- inflation

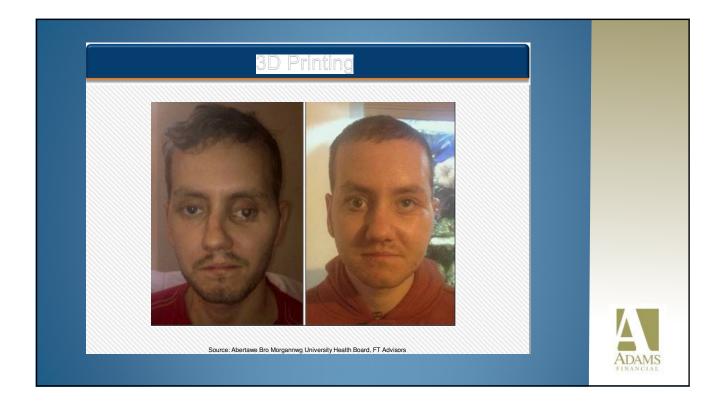




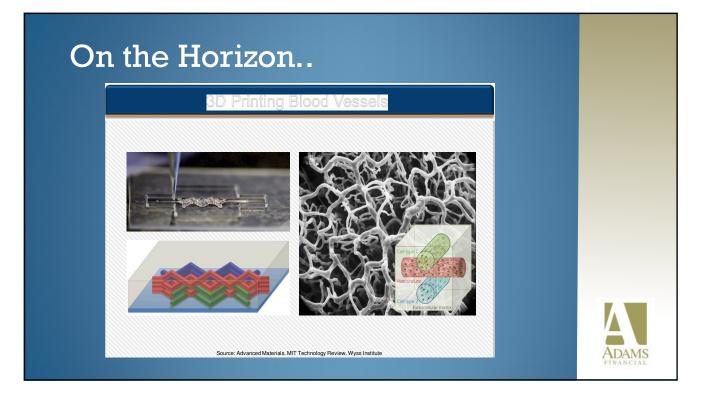
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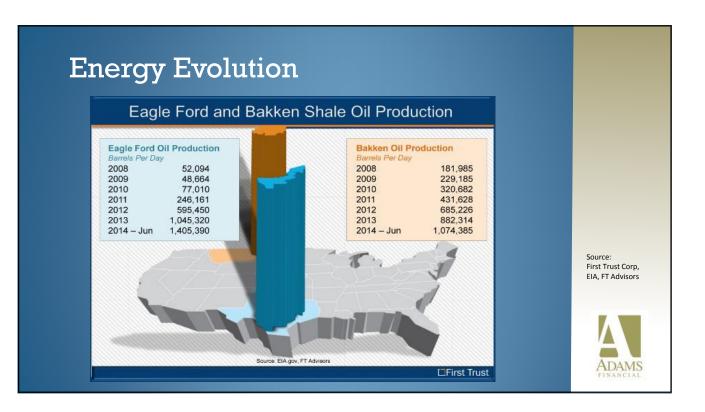






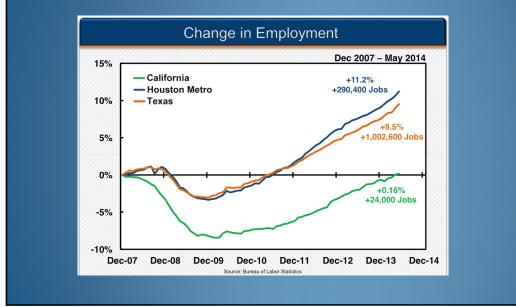


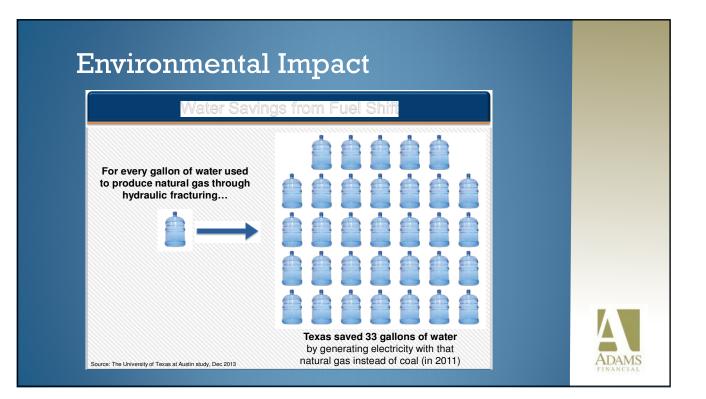
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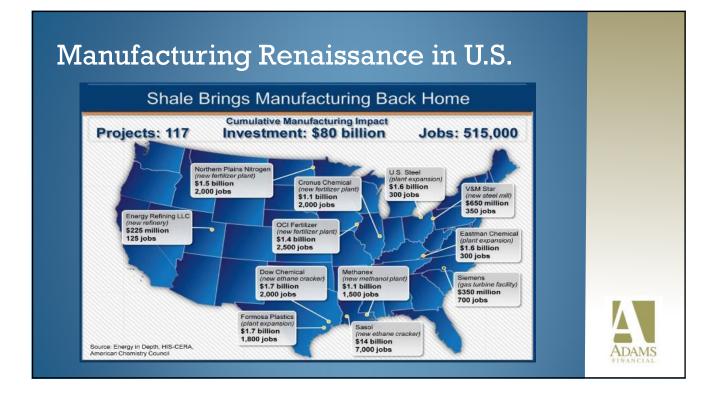


ADAMS

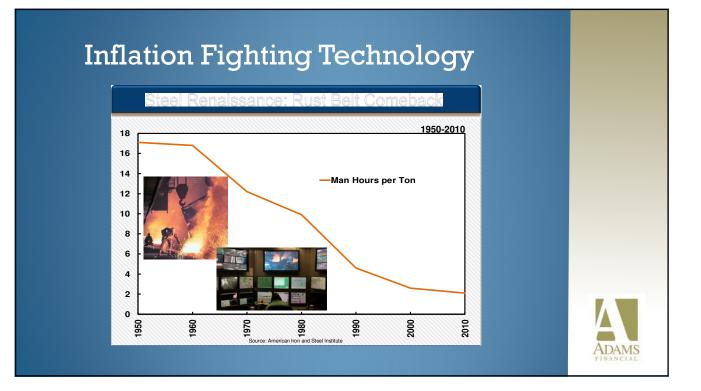
Technology Creates Jobs







				anulacit	iring Coming Bad			
	_		Company	<u>(</u>	Plant Location	Investment	Announced	
Capit	'a		ATIC		Saratoga County, NY	\$10 Billion	1/03/2014	
Capit	al		General	C.C. 4. C.C. 4.	MI, OH, IN	\$1.3 Billion	1/06/2014	
			 voestalp 	ine AG	Corpus Christi, TX	\$760 Million	4/23/2014	
Introd	tment	in	Ford		Lima, Ohio	\$500 Million	3/28/2014	
TTLAC2		┹┹┗	Mars Ch		Topeka, Kansas	\$270 Million	3/27/2014	
			• Fuyao G	ilass	Moraine, Ohio	\$200 Million	1/10/2014	
TICE	aanan		Ford Mondele		Avon Lake, Ohio New Jersey, Virginia	\$168 Million \$130 Million	3/07/2014 2/07/2014	
ບ.ວ. L	conon	.LV	Eberspa		Ann Arbor, MI	\$130 Million \$122 Million	4/09/2014	
		-	GE Aviat		Lafayette, IN	\$100 Million	3/26/2014	
				Liquidators	Virginia	\$60 Million	1/10/2014	
			Denso	Erquidatoro	Athens, TN	\$55 Million	1/14/2014	
			Beretta		Gallatin, TN	\$45 Million	1/29/2014	
	ment in the U.S. b				Source: Area Development			
Company Voestalpine AG Champion Petfoods Zuidberg Plastic Omonium Taizhou Fuling Octal E&I Engineering	Plant Location Corpus Christi, TX Logan County, KY Cedar Falls, IA Chattanooga, TN Macungie, PA West Chester, OH Anderson County, SC Dover, Delaware Chambersberg, PA	Investment \$760 Million \$85 Million \$85 Million \$65 Million \$11 Million \$12 Million \$17 Million \$9 Million \$5 Million	Announced 4/23/2014 4/24/2014 5/22/2014 5/22/2014 5/29/2014 5/23/2014 5/27/2014 4/21/2014					A
Uzin Utz AG Torcomp LLC Vinh Long	Morrilton, AR		2/12/2014				rea Development	



Taxes

With new higher tax rates in effect, we need to revisit different types of tax savings opportunities.

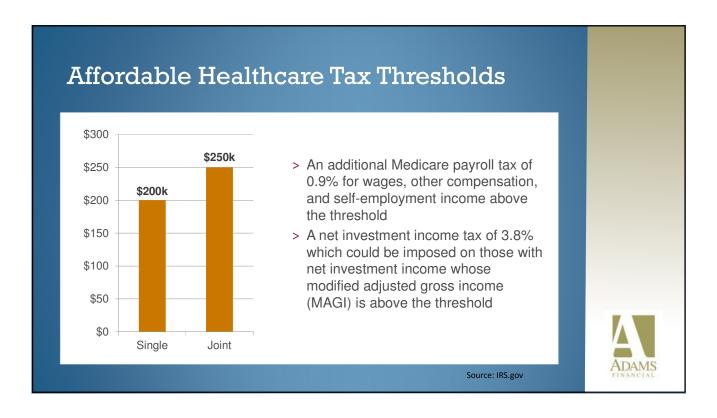


Federal Tax Rates 2014

Single indiv	iduals				Joint returns and surviving spouses							
Taxable	income				Taxable	e income						
Over (\$)	But not over (\$)	Tax (\$) +	(%) on excess	Of the amount over (\$)	Over (\$)	But not over (\$)	Tax (\$) +	(%) on excess	Of the amount over (\$)			
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9,075	36,900	907.50	15	9,075	18,150	73,800	1,815.00	15	18,150			
36,900	89,350	5,081.25	25	36,900	73,800	148,850	10,162.50	25	73,800			
89,350	186,350	18,193.75	28	89,350	148,850	226,850	28,925.00	28	148,850			
186,350	405,100	45,353.75	33	186,350	226,850	405,100	50,765.00	33	226,850			
405,100	406,750	117,541.25	35	405,100	405,100	457,600	109,587.50	35	405,100			
406,750	_	118,118.75	39.6	406,750	457,600	<u> </u>	127,962.50	39.6	457,600			



Source: IRS.gov



3.8% Net Investment Income Tax (NIIT) is payable if taxpayer is over thresholds:

Investment income (as defined below) reduced by those deductions properly allocable to the investment income

Net Investment income includes:

- > Taxable interest, dividends, rents, royalties
- Distributions of earnings from nonqualified annuities (not held in an IRA or qualified plan)
- > Net gain from the sale/disposition of certain property. Generally, does not include gain on property sold by an active business or gains excluded from income
- > Substitute dividend/interest (payments in lieu of dividends)
- > Income from a trade or business that is considered a passive activity (under the passive loss rules) or is trading in financial instruments or commodities/related derivatives

¢20.0k	Single =	\$200k AGI	Joint =			
> 3.8% NII tax (single	 > PEP/PEASE phase-out begins (single AGI) > 3.8%NII tax (joint MAGI) > 0.9% Medicare wages over threshold (joint) 	 PEP/PEASE phase-out begins (joint) 	 > 39.6% marginal rate (single) > 20% capital gains/qualifi divider ⁴ (single 	> 39.6% mar rate (joint) > 20% capita	??	

Source: IRS.gov

DAMS

Strategies to Reduce or Defer Taxes

Areas that can reduce taxes:

- Municipal vs. taxable interest
- Charitable giving
- Roth or 529 programs*
- More itemized deductions**
- Increased business expenses
- Tax credit items (energy, etc.)

* These can create future tax free income ** Now subject to phase out restrictions

Areas that can defer taxes:

- Deferred annuities
- Funding retirement accounts
- Home business use of home
- Rental property investments
- Prepay business expenses*
- Defer compensation forward
 - * up to certain IRS limits

	Check only one box.	3 ☐ Married filing separately. Enter spouse's SSN above child's name here. ► and full name here. ► 5 ☐ Qualitying widowlery with dependent child	
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	If you did not	12 Business income or (loss), Attach Schedule C or C-EZ. 12 13 Capital gain or (loss), Attach Schedule D if required. If not required, check hare ▶ 13 14 Other gains or (loss), attach Form 4797. 14	
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		36 36 37 Subtract line 36 from line 22. This is your adjusted gross income	FINANCIA

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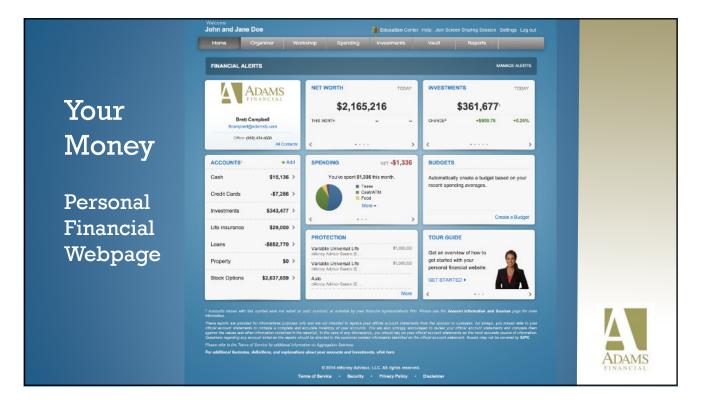
	Exemptions	b Spouse	an claim you as a depend			No. of childr	b	
A look at		c Dependents: (1) Fistname Lastname	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) If child under age t qualifying for child tax cre (see instructions)	dit • lived with ; • did not live	with	
IOOK al	If more than four					you due to di or separation (see instructi	1	
	dependents, see				<u> </u>	Dependents	an 6c	
he 1040	instructions and oheck here					not entered a		
	///	d Total number of exemption				. lines above		
	Income	7 Wages, salaries, tips, etc. /			10.0 10.0 10.	7		
ederal		8a Taxable interest. Attach So b Tax-exempt interest. Do n		ab		8a		
ederal	Attach Form(s)	9e Ordinary dividends. Attach				9a		
	W-2 here. Also attach Forms		ochadale Die redailed			30		
	W-2G and	10 Taxable refunds, credits, o				10		
ax	1099-R if tax	11 Alimony received				11		
	was withheld.	12 Business income or (loss).	Attach Schedule C or C-E	Ζ		12		
		13 Capital gain or (loss). Attac	h Schedule D If required.	f not required, ch	eck here 🕨 🔲	13		
oture	If you did not get a W-2.	14 Other gains or (losses). Att				14		
eturn -	see instructions.		5a	b Taxable a		15b		
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	Adjusted	24 Certain business expenses of						
	Gross	fee-basis government officials.	Attach Form 2106 or 2106-E	Z 24				
	Income	25 Health savings account de	duction. Attach Form 8888	. 25				
		26 Moving expenses. Attach F	orm 3903	. 26				
		27 Deductible part of self-employ	ment tax. Attach Schedule S					
		28 Self-employed SEP, SIMPL		28				-
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		 35 Domestic production activitie 36 Add lines 23 through 35 . 	s deduction. Attach Form 85	and the second second		36		FINANC

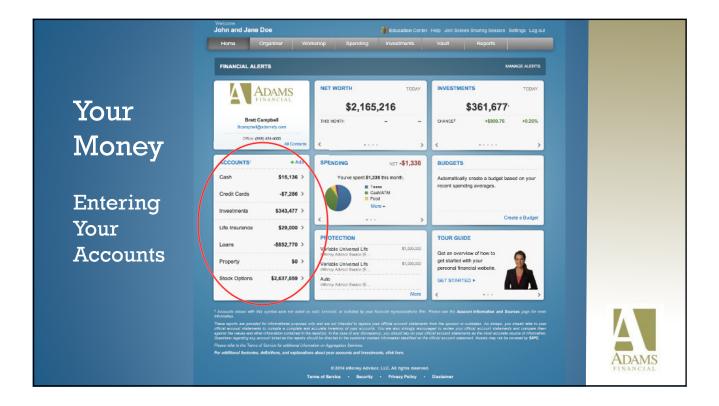
A look at the 10400 federal tax return - Image in the for the state form of the state intermined in the state intermined in the state intermined in the state intermined intermined intermined in the state intermined in the state intermined in the state intermined in the state intermined intermined intermined intermined in the state intermined in the state intermined in the state intermined in the state intermined intermined intermined in the state intermined intermined in the state intermined intermined in the state intermined inter		Exemptions	6a Vourself. If someone b Spouse	can claim you as a deper	dent, do not chec		No. of child	6b	
the 1040 Image: State in the image: Stat	A look at					qualifying for child tax cree	 iived with did not iiv 	e with	
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36 Add lines 23 through 35									ADAMS
37 Subtract line 36 from line 22. This is your adjusted gross income									FINANCIAL

Your Money..

Let's talk about how to use technology to really get your arms around your complete financial situation

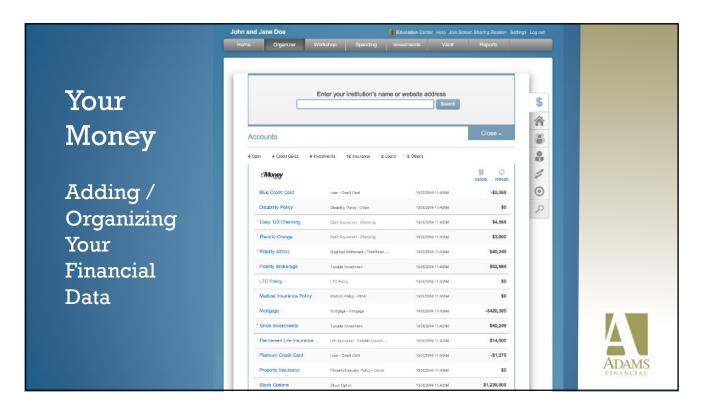


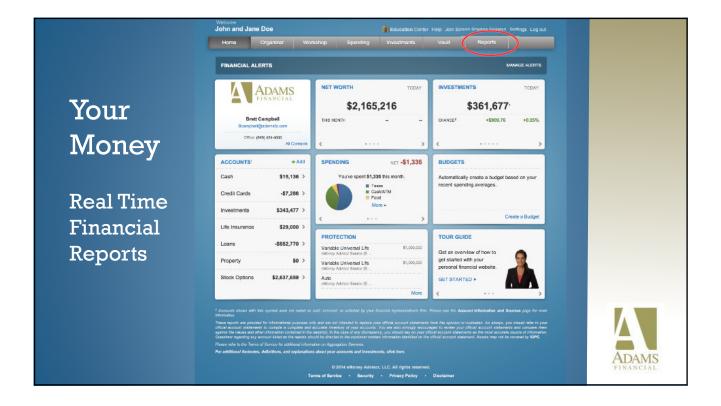


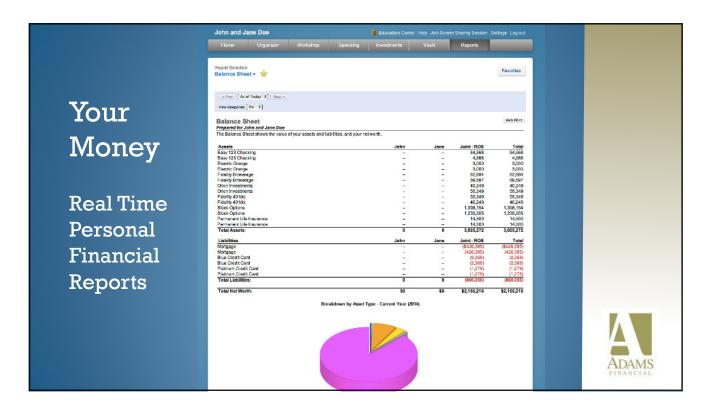




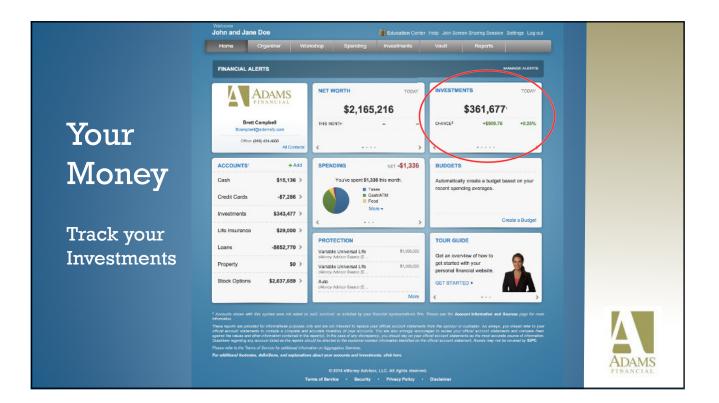
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-	Dissbility Policy	Dirability Policy - Other	10306/2014 11:00AM	\$0	8	
	* Easy 123 Checking	Gash Equivalent - Checking	10/06/2014 11:40AM	\$4,668	1	
Adina /	1 Electric Orange	Cash Equivalent - Checking	43206/3014 11:43AM	\$3,000	0	
Adding /	1 Fidelity 401(k)	Qualified Retrament - Traditional	10/06/2014 11:40AM	\$40,249	0	
Organizing	Fidelity Brokerage	Taxable investment	422623014 11:42AM	\$62,684		
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Financial	¹ Orion Investments	Taxable investment	43/06/2014 11:43AM	\$40,249		
	¹ Permanent Life Insurance	Life Insurance - Variable Univers	13/06/2014 11:43AM	\$14,500		
Data	Platinum Credit Card	Loar - Gredt Dard	43705/2014 11:43AM	-\$1,275		
	Property Insurance	Property/Coscelly Palicy - Condo	1006/2014 11:40AM	\$0		V
	Stock Options	Slock Option	13705/2014 11:43AM	\$1,239,605		
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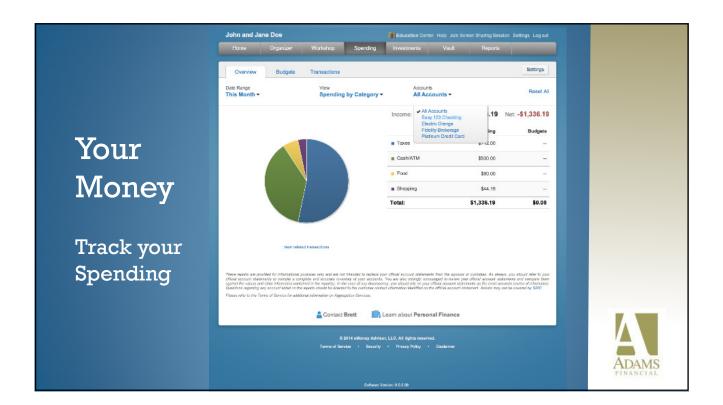
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	Favorites								
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Varia	Insurance Summery								
Your	Balance Sheet Balance Sheet					(Web Print)			
	Out of Estate Balance Sheet Trusts & Other Entities Balance Sheet								
~ -	Fact Summary	a and liabilities, and your ne	worth						
Money	Family Information Summary Property Summary		John	Jane	Joint - ROS \$4,588	Total \$4,588			
	Asset Summary		-	-	4,565	4,568			
-	Liabilities and Expenses Summary Insurance Summary		-	-	3,000	3,000			
	Income, Transfers and Savings Summary		-	2	62,684	62,684			
	Assumptions Summary Creatily Rates Summary		-	-	89,597 40,249	89,597			
	Uron Investments				55,349	55,349			
	Fidelity 401(k)		-	-	55,349	55,349			
Real Time	Fidelity 401(k) Stock Options		-	-	40,249	40,249			
	Stock Options		-	-	1,239,505	1,239,505			
	Permanent Life Insurance		-	-	14,500	14,500			
Personal	Permenent Life insurance Total Assets:		- 0	-	14,500 3,025,272	14,500			
reisonai									
	Liabilities Montgage		John	Jane	Joint - ROS (\$425,385)	Total (\$425,385)			
	Mortgage		-		(426,385)	(426,385)			
Financial	Blue Credit Card Blue Credit Card		-	-	(2,368)	(2,368)			
	Pletinum Credit Card		-	-	(2,368) (1,275)	(2,368) (1,275)			
	Pletinum Credit Cerd		-	-	(1,275)	(1,275)			
Reports	Total Liabilities:		0	0	(860,066)	(860,066)			
	Total Net Worth:		50	\$0	\$2,165,216	\$2,165,216			
		Breakdown by Assot T	ype - Current Year (2014)						
			,,						
			Contraction of the second seco						
		10 million (1997)	- 1						



	John and Jane Doe			🚺 Edu	cation Center He)	3 Join Bareen Shering S	Beasion Setting	a Logout	
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	Accounts All Investments -								
						Balance History			
	Current Value: Cash: Cash: Margin:	\$361,677.26 \$10,360.00 \$2,00			The s	elected account(s) don history data t		belance	
7	*Today's change:	\$351,315,26 +\$909.76	5%	4		history cata t	o chart.		
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	1 Fidelity 401(k)	10/08/2014 11:404.VI	\$90.00	Margin o	\$42,018.03	S42,108.00	4\$33,45	0.08%	
	1 Fidelity 401(k)	10/07/2014 D4:00P.V	\$90.00		\$55,292.41	\$55,382.41	+\$33.45	0.06%	
rack your	Fidelity Brokerage	10/08/2014 11:404.0/	\$8,000.00	\$1.00	\$71,710.00	\$76,711.00	+\$387.98	0.51%	
vestments	Fidelity Brokerage	10(07/2014 04:00P.V	\$5,000.00	\$1.00	\$84,984.38	\$89,985.38	+\$387.98	0.43%	
ivesiments	* Orion Investments	10/07/2014 04:00PM	\$90.00		\$55,292.41	\$55,382.41	+\$33.45	0.06%	
	¹ Orion Investmenta	10/05/2016 11:30AU	\$90.00		\$42,018.03	\$42,108.03	+\$33.45	0.08%	
	Total					\$361,677.26	+\$909.76		
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	¹ Accounts where with this sym information	Assumption when with their symbol were not noted ar and, seminarly or solution by your forward in the semibolic biomaken and Sauras your for more Memorative.							
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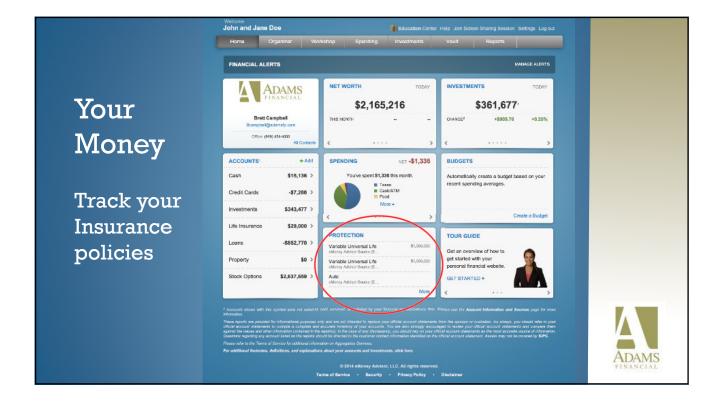


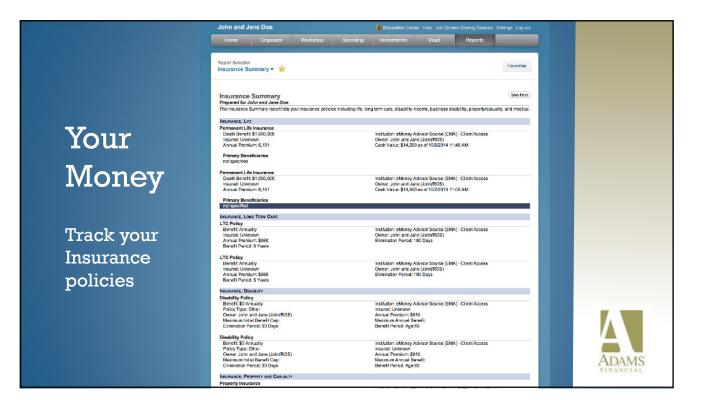
	John and Jane Doe	ucation Center Help Join Screen Sharing Session Settings Log out	
	Home Organizer Workshop Spending Inv	stmenta Vault Reports	
	1		
	Overview Budgets Transactions	Settings	
	Date Range This Month -		
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Your	view all transactions for this period	\$9,725 Terres \$712 Add	
IOUII	Auto & Transport \$0 sport / \$1,094 left		
Manar		\$1,094 🗵	
Money	Bills & Utilities \$0 spont / \$1,843 lot	\$1.843 ×	
-		41,040	
	Cash/ATM \$500 spont/\$1,073 lef	\$1,573 💌	
Real Time	view 2 transactions		
Real line	Education \$0 spent/\$297 left	\$297 <u>×</u>	
Budget	Entertainment \$0 spent/ \$43 left		
Budget	go sport ore re-	\$43 🗵	
Tracking	Fees & Chargee \$0 spont/ \$27 left		
IIdekiiig		\$27 🗵	
	Food \$80 spont/\$240 left		
	view 1 transaction	\$328 🗵	
	Mortgage & Rent \$0 sport / \$1,842 left	\$1,842 ×	
		TIMTA C	
	Shopping S44 sport/\$257 lef	\$301 🕱	ADAMS
	view 1 transaction		FINANCIAL
	Unclassified \$0 spent / \$2,377 lef	\$2 377	

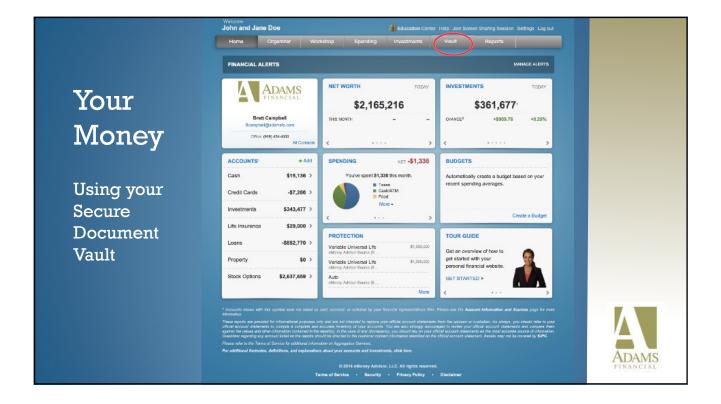
Johi	n and Ja	ne Doe			Education Cer			
H			Workshop	Spending				
•	Overview	Budgeta	Transactions					Settings
	Range 30 Days -		Accounts All Accounts +	Categori All Cate	os agories -	Search for tra	ansactions ,0	Roset All
Eq	port Results				Trans	actions Found: 4	3 Total Amount	\$7,399.25
Date	••	Description o		Account	0	Category o		Value o
Oct	05, 2014	WAWA TOWN		Fichally Bri	loange	Fast Food & Conversi	ATES	-\$80.00
Oct	04, 2014	CASH WITHD	RAWAL	Ficielity Gr	loamga	CashWTM		-\$250.00
Oct	04, 2014	CASH WITHD	RAWAL	Easy 123	Awaking	Gastwith		-\$250.00
Oct	03, 2014	STRIDE RITE	2	Platinum 0	welk Card	Clobing		-\$44.19
Oct	02, 2014	IRS		Fickelity Dec	formige	Pederal Tax		-\$365.00
Oct	02, 2014	IRS		Fory 128 (Theoking	Fadoral Tax		-\$356.00
Sep	30, 2014	STAPLES VAL	LEY FORGE	Fidelity Dr.	formge	Business		-\$3.22
Sep	30, 2014	STAPLES VAL	LEY FORGE	Platinum 0	rock Cord	Business		-\$56.55
Sep	30, 2014	STAPLES VAL	LEY FORGE	Day 123 (Dwcking	Business		-\$3.22
Sep	28, 2014	PAYMENT		FideRy Br	longe	Undersified		-\$1.00
Bep	28, 2014	PAYMENT		Ewy 123 (Dwcking	Und assifted		-\$1.00
Sep	27, 2014	WAWA TOWN	É.	Platinum 0	rociil Gard	Fast Food & Conversi	ka co	-\$3.99
Sep	26, 2014	OVERDRAFT	PROTECTION	Ficielity Gr	koraga	Bark Fee		-\$75.00
Sep	26, 2014	OVERDRAFT	PROTECTION	Eury 128	Zwokrg	Bank Fou		-\$75.00
Бер	24, 2014	INTEREST PA	YMENT	Ficinity Se	koraga	Internet Income		\$0.22
Sep	24, 2014	COLLEGEVILI	LE WEGMANS	Plataces 0	well Card	Grootie		-\$111.42
Бер	24, 2014	INTEREST PA	YMENT	Easy 128 (Theoking	Internst Income		\$0.22
Sep	22, 2014	PORSCHE FIN	ANCIAL SERVICES	Fickelly Dr.	lomge	Auto Service		-\$638.11

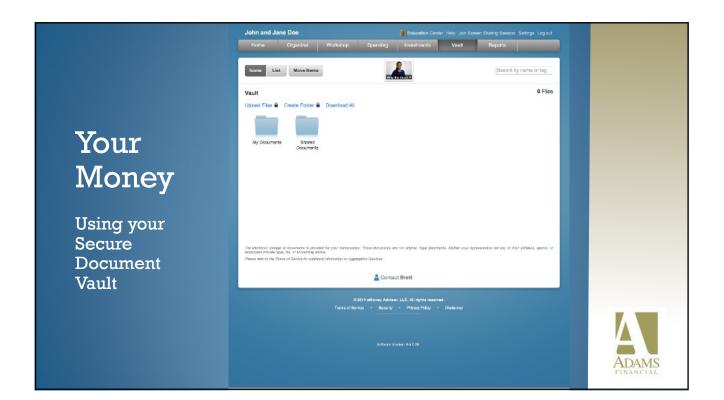
Your Money

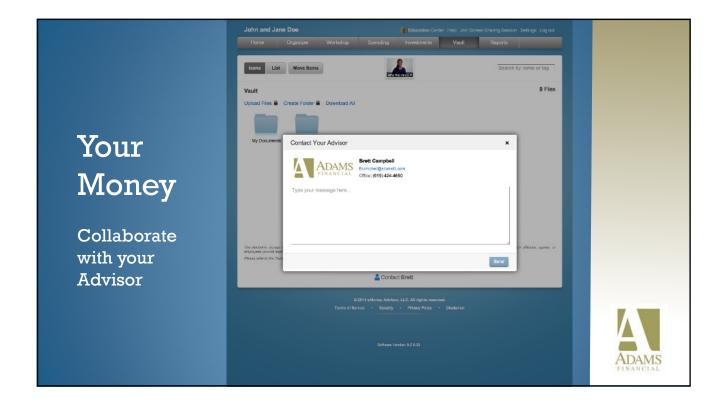
Real Time Budget Tracking

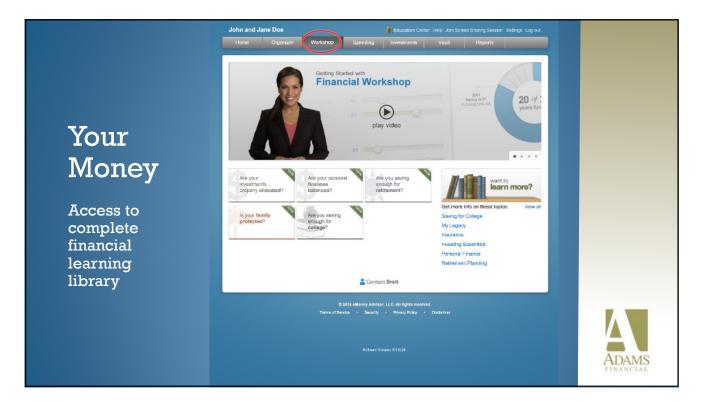




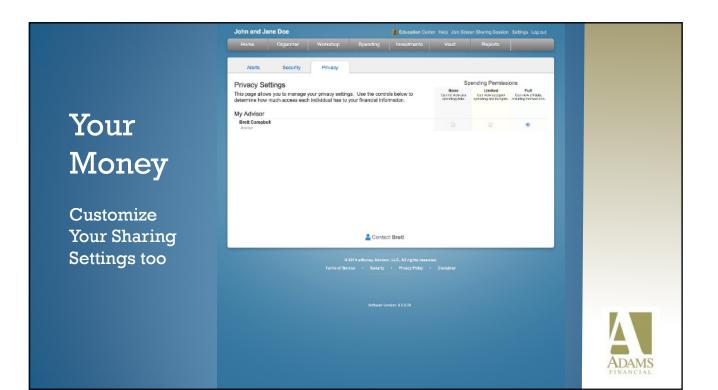








	John and Jane Doe 👔 Education Cerror Jon Stower Shuring Severan Setinge Log out
	Home Organizer Workshop Spending Investments Vault Reports
	Alarts Security Privacy
	C Delivery Settings
	Email Recipients Alerts will be sent to these email addresses Show +
	Home Page Notifications Show natifications on your hame page for 14 days
Your	all Personal Finance
Ъ	Weekly Financial Summary A periodic overview of your finances (email only)
Money	Low Cash Balance When the balance of any cash account fails below 🐵 \$500 📀
-	High Credit Balance When the balance of any credit and rises above 😐 \$2,500 (+)
~	Large Expenses When any expense occurs that is larger than 🍚 \$1,000 +
Customize	Large Deposits When any deposit occurs that is larger than 🕒 \$1,000 +
your Settings	Bank Fees When any bank fee occurs that is greater than - \$1 +
-	Budget Exceeded When your spending exceeds any of your budgets
	FICA Maximum Approaching When you're nearing your FICA max mitholding for the year
	Investment Activity When specific types of investment transactions occur
	Concentrated Position When a stock or bond makes up more than this much of your portfolio: - 40% +
	Excess Cash Position When cash makes up more than this much of your portfolio: - 33% +



Conclusions

- Technology continues to be a driver for our economy
- Medical advancements, manufacturing, energy, and more are likely to remain part of the U.S. growth story
- Taxes are higher, so there is more incentive for us to seek tax breaks where we can
- As our society evolves and becomes more complex, we are committed to providing state of the art solutions for your financial planning needs.

Required disclosures:

The views are those of Adams Financial Partners and should not be construed as investment advice. All information is believed to be from reliable sources; however, we make no representation as to its completeness or accuracy. All economic and performance information is historical and not indicative of future results. Please consult your financial advisor for more information.

The S&P500 index is an unmanaged index representing the largest 500 companies in the U.S. The Barclays Aggregate index is an unmanaged index representing the overall broad bond market. Investors cannot invest directly in indexes. The performance of any index is not indicative of the performance of any investment and does not take into account the effects of inflation and the fees and expenses associated with investing.

Past performance does not guarantee future results.

