ADARA

WEALTH MANAGEMENT

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FOCUS

Our principal focus is listening carefully to understand our clients' unique needs and objectives. Our clients always come first.

TRUST

We are dedicated to developing our client relationships based on trust. Our philosophy is that trust is built on honesty, integrity, and confidence in our high level of skill and knowledge.

TREATING CLIENTS LIKE FAMILY

We endeavor to provide the same strategies and services to our clients that we would apply to our families and ourselves, given the same circumstances.

ACCESSIBILITY

Our team knows the importance of timely communication. Our clients have access to our direct phone numbers and e-mail addresses, and they are encouraged to reach out to us at any time.

A LEGACY OF 40+ YEARS . . .

George Chardukian, the team's Founding Partner, started in the financial services business in 1979. As George's business continued to grow over the years, he felt the need to get back to his roots. His background as a former school teacher and coach compelled him to hire and mentor an aspiring financial advisor, Adam Goldstein, who began with an internship through the University of Arizona in 2006. After graduating, Adam was hired by RBC Wealth Management in January 2007. He began working closely with George, learning from his wealth of experiences and helping fulfill George's promise to his clients that their financial needs and objectives will be taken care of by someone they know and trust. In January 2008, the Chardukian-Goldstein Investment Group was formally created.

In 2020, Adam and George founded Adara Wealth Management, which offers a team of qualified individuals who work interdependently to provide the advice and creative financial planning that have been our hallmark for more than 40 years.

Strive to make a meaningful and positive impact in the lives of others.

ADARA

ADARA was founded on the principle that we will treat our clients the way we would treat our own family and friends. It's a simple idea built on believing that what's in our clients' best interest is what is also in our best interest.

We chose the name Adara because it means having high moral principles and ideals with a focus on understanding and analyzing our clients' needs. George, our founder, says, "do the right things, for the right reasons, in the right way." That's what we strive to do every single day.

Adara also means noble, having a desire to understand and learn deeper truths. All of these resonated with each of our team members in our personal and professional lives.

OUR FOCUS

We are honored and grateful for the trust our clients put in our team to help them pursue their goals. Our goal is to provide the level of service that our clients deserve. The team at Adara Wealth takes time to understand our clients' financial objectives and match them with sound strategies. Like family and friends, we are there through life changes and make adjustments as needed to help ensure we stay on the right investment path to work towards our clients' goals.

FINANCIAL PLANNING

- 401 (k) Plan establishment and reviews for employers
- Retirement Income Planning
- Investment Management
- Wealth Transfer Strategies
- College Savings Plans
- Charitable Giving
- Estate Planning

INSURANCE

- Life Insurance
- Disability Insurance
- Long-Term Care Planning

Greatness is not in how much wealth you acquire, but in your integrity and ability to affect those around you positively.

GEORGE began his financial services career in his home state of Wisconsin in 1979. Because of his passion for teaching and coaching, working with clients to help achieve their financial goals was a perfect fit. He relocated to Tucson a few years later where he continued his career, working 20 years at Northwestern Mutual and Robert W. Baird & Co. He then expanded the products he was able to offer his clients by moving to RBC where he remained for another 19 years. In 2020, he and his partner, Adam Goldstein, decided to form Adara Wealth Management to, again, increase their level of service to clients. They brought their team with them to LPL Financial, supported by the LPL Financial Strategic Wealth Services division.

George graduated from Carthage College in Kenosha, Wisconsin, and has a Master of Science in Financial Services (MSFS) from The American College in Bryn Mawr, Pennsylvania. In addition to passing the Series 6, 7, 8, 31, 63, and 66 exams, George earned his CERTIFIED FINANCIAL PLANNER™, Chartered Financial Consultant®, and Chartered Life Underwriter® designations. The multi-year CFP® program entails in-depth courses, training, and comprehensive examinations in all areas of financial planning, including investments, taxes, insurance, estate, and retirement planning.

George and his wife, Toni, live in Tucson. They were born and raised in Wisconsin. In his spare time, George enjoys exercising, golf, his church family, personal family-related activities, and most importantly, FaceTime with his two adult daughters and two grandchildren.

GEORGE J. CHARDUKIAN
CFP®, CLU®, ChFC®, MSFS
FOUNDING PARTNER, WEALTH ADVISOR

If you love what you do, you'll never work a day in your life.

ADAM GOLDSTEIN
CFP®, CPFA, MSFS
CO-FOUNDER & PRESIDENT
WEALTH ADVISOR

When you change your life for the better, you positively change the world around you.

ADAM was drawn to the financial services industry because of his desire to really help people, and he learned that financial advising is far more than investment management. Adam knew he wanted to become an advisor after visiting a career fair in high school. He even remembers picking stocks with his dad from the newspaper from a young age. George Chardukian, the other founding partner of Adara Wealth Management, brought Adam on as an intern at RBC Wealth Management and then hired Adam right out of college. Adam has remained by George's side since he began his career in 2007. Together, they launched Adara Wealth Management because they share a passion for caring for clients in a way that exceeds expectations and truly stay focused on their clients' best interests.

Adam graduated magna cum laude from the University of Arizona. In 2013, he completed a Master of Science in Financial Services (MSFS) from the American College in Bryn Mawr, Pennsylvania. Adam earned his CERTIFIED FINANCIAL PLANNER™ certificate, which entails in-depth courses, training, and comprehensive examinations in all areas of financial planning, including investments, taxes, insurance, estate, and retirement planning.

While pursuing his undergraduate education, Adam was a placekicker for the University of Arizona varsity football team. This competitive and rigorous experience enabled him to develop the leadership skills, work ethic, and perseverance that were crucial to preparing him for a career as a financial advisor.

Adam was born and raised in Phoenix. He met his wife, Dana, at the University of Arizona, and they have three children. In his spare time, Adam enjoys coaching his children's sports teams, golf, soccer, and spending time with close friends and family.

MARI joined the team in 2018 at RBC Wealth Management after initially beginning her career as a financial advisor with Merrill Lynch in 2015. Prior to transitioning into the financial services industry, she spent more than 13 years serving the citizens of Tucson as a law enforcement professional. Mari has always been fueled by her inherent desire to help people, so she is excited to be able to elevate the service she offers clients by moving with the team to an independent platform. Their newly branded firm, Adara Wealth Management, will be supported by the LPL Financial Strategic Wealth Services division in a manner that will enhance Adara's offerings and service to their clients.

Mari, a native Tucsonan, graduated from the University of Arizona. She is pursuing the CERTIFIED FINANCIAL PLANNER™ certification, which entails in-depth courses, training, and comprehensive examinations in all areas of financial planning, including investments, taxes, insurance, estate, and retirement planning. As a service-minded and detail-driven professional, Mari has developed the leadership skills and work ethic needed to provide a high level of service to those with whom she interacts. Mari's knowledge relates to planning for various life events, especially in the areas of retirement, education, longevity, charitable giving, business, and insurance solutions. Her ultimate goal is to have a positive impact on both individuals and the community as a whole.

Mari and her husband, Andy, have a daughter and are active members of the community, constantly looking for new opportunities to get involved and try new things. In her spare time, Mari enjoys exercising, traveling, spending time with family and friends, trying different restaurants, and cheering on the University of Arizona Wildcats.

MARIA (MARI) PERALTA

PARTNER, WEALTH ADVISOR

One person can make a difference, and everyone should try.

—JOHN F. KENNEDY JR.

AMY MONTIEL

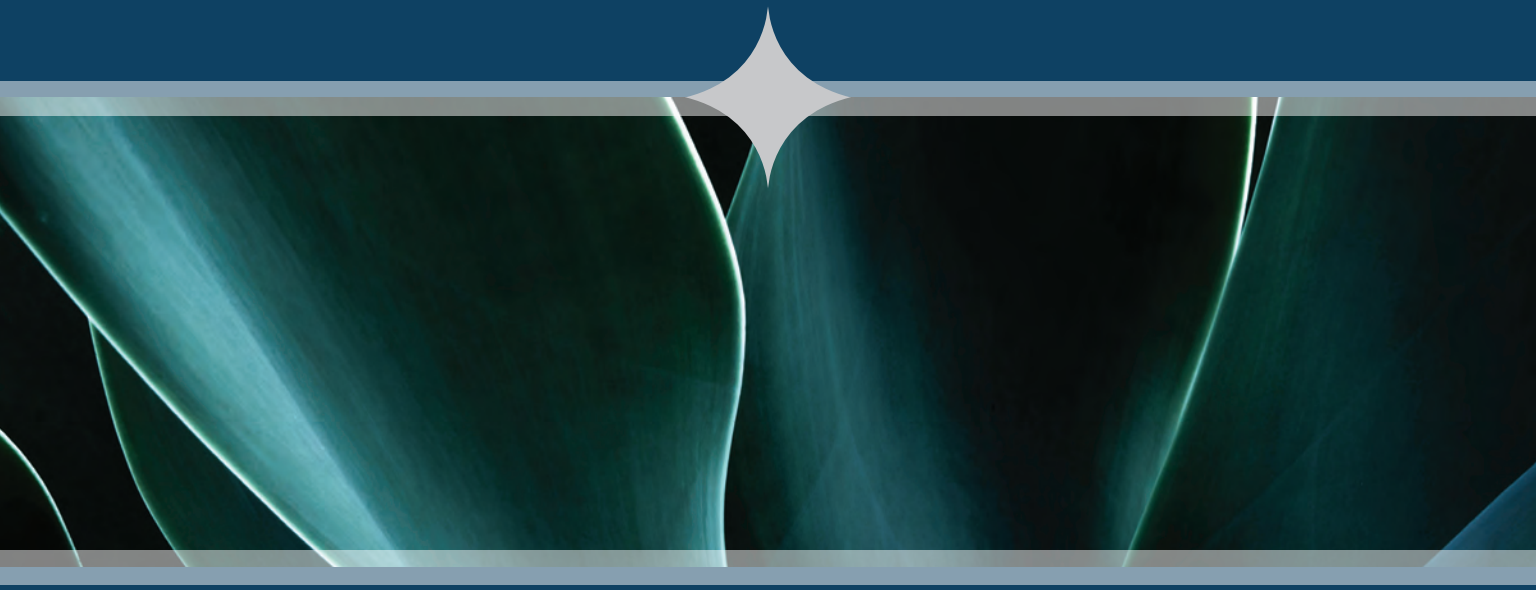
CLIENT CONCIERGE

Alone we can do so little; together we can do so much.

—HELEN KELLER

AMY'S initial career was in education where she served as both a teacher and a curriculum coach, also known as a teacher of teachers. The team asked her to join them at RBC Wealth Management as a result of her clear dedication to help others, her incredibly positive attitude, her winning smile, and her penchant for giving amazing hugs. She is excited to continue her journey with the team with the launch of Adara Wealth Management. As an independent firm, the client experience can be further enhanced, which is key for Amy. The move further extends her passion for learning and appeals to her love of helping others. As an added bonus, Adara Wealth Management is a family environment in which Amy can continue to deepen her relationships with clients as well as maintain flexibility that allows her to spend more time with her family.

Amy graduated summa cum laude from the University of Arizona with a degree in Education, and she has enjoyed helping children and families in Tucson and Nogales ever since. She and her husband, Arnold, have two children. They appreciate every opportunity to travel to new places, go on adventures in Tucson as a family, find new restaurants to enjoy, and go wine tasting. In her spare time, Amy also enjoys running, reading, cheering on the Arizona Wildcats and spending time with her friends and family.



AdaraWealth.com

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