



## **Urban Adams, Investment Advisor Representative, Dynamic Wealth Advisors**

Urban Adams is an Investment Advisor Representative of Dynamic Wealth Advisors, a registered investment advisor. Urban earned a Bachelor of Science degree in Business Administration, and has held numerous securities licenses (6, 7, 9, 10, and 63) during his career. Urban possesses nearly 15 years' experience in the financial services industry. Urban began his career with a prominent mutual fund company, and worked with individual investors. Later, Urban joined a major discount brokerage firm, where he worked nearly 10 years. Prior to joining Dynamic Wealth Advisors, Urban worked as Director of Operations, and Investment Advisor Representative for a large RIA in Orange County, California.

As an independent, fee-only advisor with Dynamic Wealth Advisors, Urban works with a wide range of clients from small business owners to employees of large corporations, from clients who are still accumulating their wealth to those nearing (or in) retirement. Urban focuses on his clients' long term goals for retirement, college savings, legacy, and more, and works with clients to design a plan to reach their goals.

In addition to individual wealth management, and financial planning, Urban also serves as advisor to retirement plans for businesses.



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