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ADLER CHARLES, CEO

### ABOUT US

At Adler Charles Services, we are your trusted strategic business partner in navigating the intricate multiple facets and landscape of insurance, financial management, and business services. With a strong commitment to excellence and a dedication to our clients, we provide a comprehensive suite of solutions tailored to meet the diverse needs of small business owners, individuals, and employees.

### COMPANY OVERVIEW

Adler Charles Services not only provide cost-effective insurance solutions for all your coverage requirements, but our extensive suite of professional business service offerings positions us as a valuable strategic ally and essential collaborator in your overall business success.

We offer a comprehensive range of business service solutions, encompassing Small Business Owners Insurance, Personal Insurance, Employee Insurance, Tax Preparation, Bookkeeping, and Small Business Accounting. What sets us apart is our unwavering commitment to excellence in each of these core business service solutions, ensuring that they are all equally well-executed.

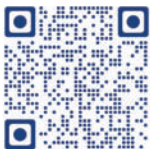
### MISSION

Our mission is to have our team of skilled and seasoned business service professionals support our clients consistently throughout the year. We aim to deliver expert guidance, exceptional service, and results that contribute to the growth and long-term success of our clients. At the core of our operations lies a systematic approach, which means that our methods are designed to facilitate evaluation, improvement, and knowledge sharing, ultimately leading to an increase in maturity and effectiveness.

### CORE VALUES

- ▶ **MAKE AN IMPACT** - Desire to be impactful & make that Desire into actionable, measurable steps.
- ▶ **DO THE RIGHT THING... PERIOD!**
- ▶ **FIND A BETTER WAY** - A culture of innovation and continuous improvement.
- ▶ **BE TRANSPARENT** - Share insights responsibly. Seek input and offer feedback.

### DIGITAL MEDIA



WEBSITE



FACEBOOK

### CORE COMPETENCIES

#### Bookkeeping Services

#### Small Business Accounting

#### Business Owners Insurance

- ▶ General Liability
- ▶ Workers Compensation

#### Employee Insurance

- ▶ Group Health
- ▶ AD&D
- ▶ Long Term Care
- ▶ Supplemental Retirement Plans
- ▶ Group Health

#### Personalized Insurance

- ▶ Life Insurance
- ▶ Pet Insurance
- ▶ Medicare Supplement
- ▶ Senior Life Insurance
- ▶ Annuities

#### Tax Preparation Services

- ▶ Professional Liability

- ▶ Dental & Vision
- ▶ Disability
- ▶ Retirement Plans
- ▶ Life & Health
- ▶ Dental & Vision

- ▶ Individual Health
- ▶ Medicare
- ▶ Medicare Advantage
- ▶ Prescription Drug Plan

### NAICS

- ▶ 524210 Insurance Agencies & Brokerages
- ▶ 541213 Tax Preparation Services
- ▶ 541219 Other Accounting Services
- ▶ 541611 Administrative Management & General Management Consulting

### PAST PERFORMANCE

- ▶ Accardi Designs
- ▶ Sky N Beyond
- ▶ True Hart Boutique
- ▶ In The Biz Ink
- ▶ SoFlo Sellers
- ▶ Bead Mama LLC
- ▶ Stud Masters LLC



### PERTINENT COMPANY INFORMATION

- ▶ 2 - 15 Health & Life (Including Annuities & Variable Contracts) Agent License
- ▶ IRS Practitioner Identification Number – Taxes
- ▶ QuickBooks ProAdvisor Certification - Bookkeeping
- ▶ Web Site Design Certification
- ▶ Certified Minority Owned Small Business

