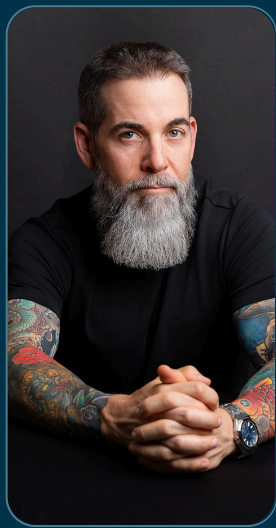
PRESS KIT

ADAM SENDZISCHEW MBA, CLU®, CFP®

CEO & MANAGING PRINCIPAL | PHYLAX LEGACY ADVISORS

FINANCIAL PROFESSIONAL | RJFS




Adam helps families turn complex wealth into durable legacy, without losing the human intent behind the structure.

BIOGRAPHY

Adam Sendzischew specializes in addressing the complex estate puzzles faced by the world's most successful families. With a focus on ultra-high-net-worth asset transition, Adam integrates advanced life insurance concepts and private placement structures into holistic, long-term estate plans. His work is centered on helping families reduce potential risk while enhancing the architecture of their assets to help ensure their legacy remains a positive force for future generations.

A graduate of the University of Miami (ranking in the top two percent) with an MBA in Finance, Adam holds a unique combination of professional credentials that allow him to collaborate seamlessly with a client's legal and tax advisors, including:

- CERTIFIED FINANCIAL PLANNER® (CFP®)
- Chartered Life Underwriter (CLU®)
- Accredited Wealth Management Advisor (AWMA®)
- Accredited Asset Management Specialist Advisor (AAMS®)
- Trust and Estate Practitioner (TEP) from the Society of Trust and Estate Professionals
- Certified Exit Planning Advisor (CEPA)

Adam's approach is defined by a global perspective and a commitment to values-driven planning. He successfully bridges the gap between technical financial engineering and the human element of legacy.

His commitment to the long-term stewardship of family heritages earned him recognition on the Forbes | SHOOK Top Financial Security Professionals List, ranking #5 Best-In-State (Florida - South) and #50 nationwide. This accolade underscores his focus on helping safeguard family assets across a multi-generational horizon, maintaining structural frameworks so they remain sound as they transition to future generations.

PRACTICE PROFILE & FACT SHEET

Established originally as Jones Lowry in 1981, Adam led the practice's transition to Phylax Legacy Advisors to better reflect its ultimate purpose: acting as dedicated guardians of significant family legacies.

HEADQUARTERS

West Palm Beach, Florida

KEY DIFFERENTIATOR

Life insurance-based asset transition planning, sophisticated estate architecture, family governance advisory, and executive benefit designs.

INSTITUTIONAL AFFILIATIONS

Greenberg & Rapp Financial Group

M Financial Group

The Ridgeback Group

Raymond James Financial Services

MEDIA CONTACT

WEBSITE

www.simplylegacy.com

CONTACT NAME

Sage Miller

EMAIL

sage@samimc.com

PHONE

906.262.0111

CORE PHILOSOPHY

We believe that wealth should not be a disruptive force for the next generation. True guardianship requires designing structures that preserve both the financial value of the estate and the original values of the family who built it.

THE MEANING BEHIND PHYLAX

Under Adam's leadership, the practice transitioned from the legacy name Jones Lowry to Phylax Legacy Advisors, representing a deliberate shift from a founder-based brand to a mission-based identity.

THE ETYMOLOGY

The word *phylax* (Greek: φύλαξ) historically refers to a guardian, protector, or sentinel. In ancient cultures, the phylax was charged with safeguarding the community's most sacred treasures and maintaining the long-term integrity of their strongholds.

THE SYMBOLISM

The practice's visual identity features a structured shield emblem that subtly integrates the letter P. This shield represents the institutional boundaries Adam and his team design to help shield family legacies from structural risks, tax changes, and generational erosion.

THE MISSION

Adam and his team act as sentinels for family estates. Adam's work is about building durable, fifty-year architectures that allow a family's values to endure alongside their financial success.

MEDIA ASSET DIRECTORY

FORMAL INSTITUTIONAL

OFFICIAL FORMAL HEADSHOT

Primary institutional portrait designed for administrative listings, carrier files, and formal directories.

FULL-LENGTH STANDING SUIT

A complete institutional portrait communicating permanence, stability, and executive leadership.

FORWARD-FACING FORMAL HEADSHOT

Alternate institutional portrait designed for administrative listings, carrier files, and formal directories.

FORMAL CONTEMPORARY

SMILING SLEEVES PORTRAIT

A warm and highly approachable portrait that blends formal business attire with transparent personal style.

STOOL SEATED ACTIVE PORTRAIT

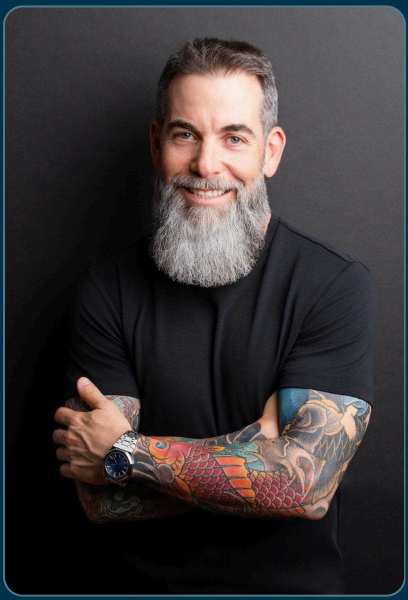
Combines high-end tailored clothing with a relaxed, active posture, bridging traditional and modern aesthetics.

COMPOSED SLEEVES PORTRAIT

A strong, classic presentation framing quiet competence and dedicated structural oversight.

MEDIA ASSET DIRECTORY

EDITORIAL



FRIENDLY STUDIO PORTRAIT

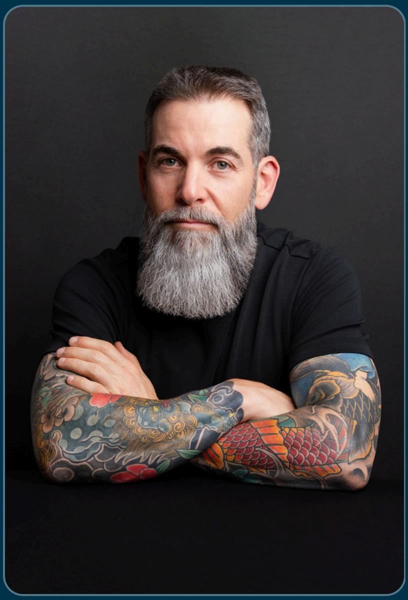
A genuine, direct representation ideal for digital introductions, client welcoming guides, and social assets.

FOCUSED DESK (WHITE TEE)

Captures a focused, clear perspective that highlights transparency and modern individual leadership style.

CONTEMPLATIVE DESK (BLACK TEE)

Reflects deep study, logical precision, and dedicated attention to complex structural designs.



STRUCTURED DESK (BLACK TEE)

A balanced composition depicting a contemporary sentinel who remains approachable yet entirely focused.

SMILING DESK (WHITE TEE)

Projects warmth, accessibility, and high energy. Lowers communication barriers for rising generations.

CANDID DESK (BLACK TEE)

A warm and genuine portrait highlighting ease of dialogue, perfect for introducing collaborative services.

BRAND LOGOS & PALETTE

Please contact us for high-resolution logo and image files.

HORIZONTAL TREATMENT

PHYLAX
LEGACY ADVISORS

PHYLAX
LEGACY ADVISORS

VERTICAL TREATMENT

PHYLAX
LEGACY ADVISORS

PHYLAX
LEGACY ADVISORS

PRIMARY PALETTE

MIDNIGHT TEAL	CELEBRATION BLUE	TRUE WHITE
Trust & Professionalism	Loyalty & Responsibiity	Transparency & Integrity
#00334a	#51798a	#ffffff

SECONDARY PALETTE

LEGACY BLACK	GOLD LUSTRE	GUARDIAN GOLD
Knowledge & Experience	Excellence & Precision	Commitment & Care
#b29750	#c9ae62	#b29750

RECENT PRESS RELEASES

Click to view the release.

JULY 2026

Phylax Legacy Advisors CEO & Managing Principal Adam Sendzischew Named among Top Financial Security Professionals by Forbes

Recognized as #5 Best-In-State, Florida - South and #50 nationwide.

MARCH 2026

Phylax Legacy Advisors Expands to Midwest; Welcomes Veteran Shannon Hahn to Team

Hahn's addition marks a strategic move for the Florida-based practice, broadening geographic reach.

JANUARY 2026

Jones Lowry Rebrands to Phylax Legacy Advisors, Signaling Next Phase of Growth in High-Net-Worth Insurance & Legacy Planning

Transitioning from founding partners to a core identity of asset guardianship.

ADDITIONAL INFORMATION & DISCLOSURES

BIOGRAPHY DISCLOSURES

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