

Adam W. Stauffer, Director

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Cover Page (Item 1)

Supplement for	Adam William Stauffer
Title	Director
Citizen of	United States
Physical Work Address	Sebastian's on the Beach, Little Apple Bay, Tortola, VG1130
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Website(s)	www.oialtd.com

Education Background and Business Experience (Item 2)

Supplement for	Adam W Stauffer
Undergraduate Education	BA Biology – Trinity College
Graduate Education	MBA Finance – Wharton, University of Pennsylvania
Career History	<ul style="list-style-type: none"> ➤ ETF Trader – Barclay Capital (2008-2009) ➤ ETF Trader- Lehman Brothers (2006-2008) ➤ Intern – Lehman Brothers (2005) ➤ Various – Advent Software (1998-2004)
Professional Designation(s)	Chartered Financial Analyst (CFA) - The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 135 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients’ interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today’s quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 19 countries recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

Loss of Professional
Designation(s)

NA

Disciplinary Events (Item 3)

Supplement for	Adam W Stauffer
Disciplinary Events (2014)	NA
Disciplinary Events (2013)	NA
Disciplinary Events (2012)	NA
Disciplinary Events (2011)	NA
Disciplinary Events (2010)	NA

Disciplinary Events (2009)	NA
Disciplinary Events (2008)	NA
Disciplinary Events (2007)	NA
Disciplinary Events (2006)	NA
Disciplinary Events (2005)	NA
Disciplinary Events (2004)	NA
Disciplinary Events (2003)	NA
Disciplinary Events (2002)	NA
Disciplinary Events (2001)	NA
Disciplinary Events (2000)	NA

Other Business Activities (Item 4)

Supplement for	Adam W Stauffer
Other business activities	NA
Associated conflicts of interest	NA
Mechanism to address these conflicts	NA
Compensation (e.g., commissions, bonuses, distribution and service ("trail") fees from mutual funds and non-cash compensation)	NA

Additional Compensation (Item 5)

Supplement for	Adam W Stauffer
Arrangement in which someone other than a client provides economic benefit	NA
Sales awards or prizes	NA
Gifts and entertainment	NA

Supervision (Item 6)

Supplement for	Adam W Stauffer
Supervisor	James Bridgewater
Title	Principal & Chief Compliance Officer
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