Estate Planning Council of South Orange County

Our mission is to provide quality educational and networking opportunities to our members and guests

Michael J, Occhipinti, President

Monthly Meeting Announcement

Tuesday, January 8, 2008

Saddleback Memorial Medical Center
Conference Room #
7:30 - 9:00 AM

Map & Directions: http://www.memorialcare.org/saddleback/directions/map.cfm

Parking: Hospital Lot or Laguna Hills Mall Lot

Complimentary Breakfast for Members and First Time Guests--*Invite a colleague*
$25.00 for others

**** Please RSVP by January 4th ****
Call (949) 452-3795 or Email mocchipinti@memorialcare.org

Family Wealth Blueprint®

Presented by Tim Voorhees

Learn how your clients can pursue their passions, crystallize their vision, and make the fullest use of their resources! During this 60-minute presentation, Tim Voorhees refers to a variety of studies and success stories when documenting the benefits of developing a Blueprint to make full-use of all resources available to your clients. We will review a case study on how Thomas and Virginia Smith used basic, leveraged, total wealth control, and optimized plans to zero-out unnecessary income, capital gains, AMT, estate, gift, and generation skipping taxes. We will review how the Smiths integrated twelve planning instruments to eliminate estate taxes, reduce income taxes by more than $3 million, increase transfers to heirs by almost $9 million, and direct more than $13 million of tax savings to their favorite charities. We will discuss how the Smiths locked in retirement security while freeing up philanthropic capital to help the Smith family members heed the wisdom of wise philanthropists, who exhort: “Do your giving while you’re living, so you’re knowing where it’s going.”

Tim Voorhees, JD, MBA, is a tax lawyer and investment adviser based in Irvine, California. He is the president of Voorhees Family Office Services and the managing partner of the Million Voorhees LLP tax law firm. Serving clients as a Wealth Counselor, Tim has led teams that have developed hundreds of Family Wealth Blueprints® for high net worth clients. Tim teaches Best Tools Workshops for advisers interested in learning how to integrate the most effective zero tax planning tools into financial and estate plans. He also conducts Best Practices Workshops for advisers who seek to integrate advanced Wealth Counseling technologies into their practices. Tim lives with his wife Darci and their three teenage sons in Mission Viejo, CA.