INSTRUCTOR

TIM VOORHEES, JD, MBA

Tim is now in his 30th year as a Wealth Counselor. In addition to a Juris Doctorate with a concentration in corporate and estate planning, Tim holds a BA in economics and an MBA in finance. Since focusing on zero tax planning in 1990, Tim has led planning teams that have developed several hundred cases for clients with net worths ranging from $3 million to over $1 billion. His planning staff integrates any of more than 300 tactical planning tools into plans that reduce or eliminate taxes, increase transfers to heirs, enhance charitable giving potential, or achieve other personal or financial goals. Tim has a well-developed and effective process for coordinating a client's advisers to develop plans using proprietary software. Tim specializes in developing comprehensive Family Wealth Blueprints® that include year-by-year balance sheet and cash flow numbers in a format that advisers can easily update. The plans use graphics, text, and numbers to show how a family can blend an optimal mix of planning instruments to optimize estate plans and portfolios to realize the family's mission.

THE FIRM

Voorhees Family Office Services ("VFOS") and its affiliated law firms provide comprehensive legal, wealth counseling and wealth blueprinting services. VFOS equips various "Members" throughout the country with a broad array of customized marketing, planning, and case management resources. Members access proprietary software to produce "Family Wealth Blueprints® that help clients reduce or eliminate taxes, increase transfers to children, enhance charitable giving goals, and/or achieve other personal and financial goals. The Blueprints provide fully integrated flow charts, legal document summaries, and lifetime or inter-generational projections of after-tax income and/or after-tax wealth transfers.

VFOS planners normally deliver their services throughout two or more separate phases. Phase 1 of the process typically begins with a discovery session and culminates with a Financial Checkup ("FC") and Value Proposition Letter ("VPL"), which set the stage for the second phase. During Phase 2, VFOS planners take language about the client's vision and values from the Phase 1 documents to develop a ranked list of goals to guide selection and integration of legal and financial tools. After developing the Phase 1 and Phase 2 deliverables described above, VFOS planners facilitate implementation of the plan during Phase 3 and Phase 4. VFOS typically works with the referring advisers to help them collect most of the implementation revenue. Phases of the planning process are described in greater detail under "Quick Tour" at vfos.com.

Family OFFICE SERVICES

8105 Irvine Center Drive • Suite 780
Irvine, California 92618
800-447-7090 • Fax 866-447-7090

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BEST TOOLS WORKSHOP DAY 2

FREE SAMPLE PLANS: All attendees will receive a sample plan for each of the tools discussed during our program. Each sample plan will include a flow chart showing how the illustrated planning tool reduces taxes, increases transfers to heirs, enhances charitable giving potential, and/or achieves other important goals. The sample plans will also include presentation notes to help the adviser identify the best prospects, explain key concepts, and implement the plans effectively. The techniques discussed will help you show your clients:

- How to avoid gift taxes on large insurance premium payments
- How to sell their business tax free
- How to make tax-free distributions from their business
- How to make life insurance premiums tax-deductible
- How to exercise nonqualified stock options tax-efficiently

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BEST TOOLS WORKSHOP DAY 2

LEARN ABOUT THE MOST CREATIVE AND POWERFUL STRATEGIES USED BY THE TOP ADVISERS IN THE INDUSTRY.

- ☐ Fast-paced
- ☐ Client-focused
- ☐ Marketing-oriented

WHO SHOULD ATTEND

- Insurance Professionals
- Attorneys
- Financial Advisers
- Estate Planners
- CPAs, EAs, and Accountants
- Any professional interested in a survey of strategies that go beyond the basics

WHY YOU SHOULD ATTEND

Best Tools Workshop – Day 2 Agenda

- Welcome (George and Chandler)
- Introductions of attendees
- Dominating the industry with the Family Office System model
  - Wealth Counseling Distinctives
  - Zero-Tax Planning Distinctives
  - Wealth Blueprinting Distinctives
  - Multi Family Office Distinctives
- Delivering more value and charging fees
- Presenting the sample Comprehensive Case Study Case (Thomas and Virginia Smith)
- Conducting the Discovery Session and engaging the client.
- Presenting "silver bullet" sample tactical plans
  - Qualified Money Conversion plan
  - ExTRA wealth transfer
  - Captives
- Illustrating the above sample plans using software at www.vBlueprint.com

For more details regarding seminars and workshops offered please visit Virtual Family Office Services at www.VFOS.com.

PROGRAM CONTENT

- Clarifying goals using the online Phase 1 Software
  - Family Wealth Statement software
  - Value Proposition software to match goals with appropriate tools and summarize the tools in the client deliverable
  - Financial Checkup software
- Identifying insurance and investment opportunities
- Using the online robot to illustrate basic ideas
  - "Insurance as an Asset Class"
  - "Annuity Arbitrage"
  - "Insurance warehousing"
  - Annuity Income Maximization,
  - IRA Maximizer
  - Insurance Capacity Capture,
  - Insurance as Asset Class
- Using the online robot to illustrate intermediate planning techniques:
  - TCLAT
  - CRT
  - IDIT
  - QPRT
  - Grantor Retained Annuity Trust
  - Super CLAT
- Using the online www.vTasker.com. case tracking system to insure efficient and cost-effective implementation of plans
- Next Steps

To register now, send an email to: info@vfos.com, call, or fax the completed form to (800) 447-7090.

Register Today!

Best Tools Training Workshops begin with a continental breakfast at 7:15 AM. Our presentation starts at 8:00 AM with a break at noon for a complementary box lunch. Best Practices Training Workshops end at 4:00 PM.

Full name: ______________________________

Informal name for nametag: ______________________________

Company: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Daytime telephone: ______________________________

FAX number: ______________________________

E-mail address: ______________________________

Professional designations: ______________________________

I will attend the Best Tools Workshop checked below:

☐ Friday, 02/29/2008, Hyatt Regency, Irvine, CA
(near the John Wayne Airport and Newport Beach)

☐ I am registering by Feb. 21, 2008 to qualify for the discounted registration fee of $450.00

☐ I am registering after Feb. 21, 2008 for the regular price of $500.00

If paying by credit card, please complete the following:

Card Type: ☐ VISA ☐ MasterCard ☐ AmEx

Card Number: ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐

Expiration Date ☐☐☐☐ CCV ☐☐☐

____
Your Signature

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Name as it appears on credit card

Register for Best Tools today

By phone: (800) 447-7090
By fax: (866) 447-7090
By email: julie@vfos.com

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