

Look Beyond

The needs of your organization
to focus on each donor's needs



*Our Tax Strategies Can Help Your Donors Redirect Tax
Savings to Their Families and Your Organization*

Copenbarger & Voorhees  LLP
attorneys at law



*Help Your Donors Redirect Tax Savings
to Their Families and Your Charity*

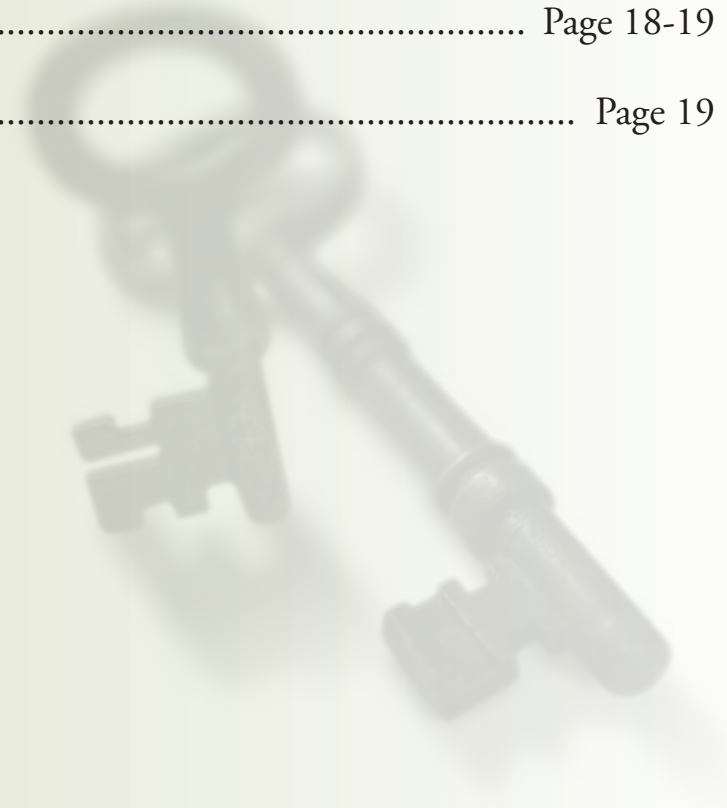
Lloyd Copenbarger, JD, LLM & Tim Voorhees, JD, MBA

Copenbarger & Voorhees LLP
18200 Von Karman, Suite 200
Irvine, CA 92612

Office: 800-447-7090 or 949-878-9400
Facsimile: 866-447-7090 or 949-878-9401

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HOW CAN YOU CAPITALIZE ON THE “MOST ENORMOUS GROWTH AREA IN THE U.S. ECONOMY ?”

Experts estimate that up to \$132 Trillion will transfer from the older generation to the younger generation over the next 40 years. The government may tax up to half of this money unless wealth transfer planners redirect the tax money to charity. Several leading organizations offer to train advisers to transfer taxes to charity and family. How do you evaluate these programs? Ask to see sample marketing materials, sample plans, planning team bios, training program handouts, and



details about the last 100 implemented plans. You will see that Copenbarger & Voorhees LLP can provide abundant data to differentiate our products and services from those offered by other organizations. If you are a charity board member, you can enter into an agreement with us to provide advanced planning technology to a development team that can set the standard for effective giving. We can show you how to develop unprecedented projections of current and deferred gifts. If you would like to take full advantage of our 21st century resources and capture your share of the multi-trillion dollar transfer, here are the next steps:

NEXT STEPS

1. **Schedule a presentation** to your board. We can do live or webinar presentations.
2. **Email info@vfos.com** to request the Charity Member Agreement and License.
3. **Sign the Charity Member Agreement** and fax it back to 1-866-447-7090.
4. **Have professional advisers** affiliated with your charity attend our live or web-based Best Practices and Best Tools training to learn how to make the best use of our resources.
5. **Have your charity advisers** purchase the Custom Presentation Materials and the Best Practices Web Access so that you will have all necessary resources for donor presentations.
6. **Show customized presentation materials** to prospective donors and use sample engagement letters and other resources on the Best Practices Web Access to engage clients.
7. **Call 1-800-447-7090 to schedule** calls with our staff members to discuss next steps with engaged donors or to develop a business plan for engaging and serving donors.

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CharityBoard100306

CALL US NOW TO MAXIMIZE AFTER-TAX BENEFITS

OUR MISSION IS TO HELP YOUR CHARITY realize its vision for helping donors minimize taxes and maximize benefits – for the donor, the donor’s family, the donor’s business, and the charity that refers us to the donor.

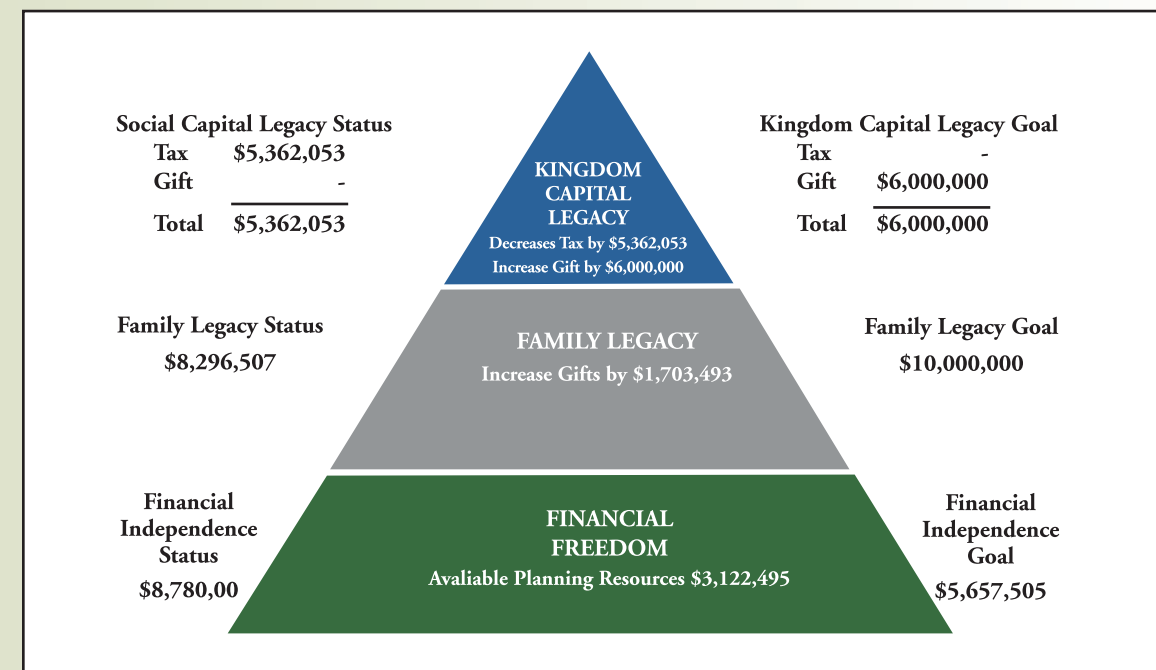


We help your donors fund their visions with carefully-crafted plans based on all available resources. By studying the cash flow needed to fund financial independence, we can illustrate more tax efficient ways to realize each donor’s vision for lifetime income and appropriate transfers to family members. We show how to integrate the proper planning

instruments to help each donor have ample wealth for retirement and family while experiencing the joy of actively building a charitable legacy. To see how our trained staff can help your charity and donors cost effectively realize their vision, please call us at 800-447-7090 or email us at info@vCV.com.

“But one thing I do: Forgetting what is behind and straining toward what is ahead, I press on toward the goal to win the prize for which God has called me heavenward in Christ Jesus.”

– *Philippians 3:13-14*



Copenbarger & Voorhees attorneys at law **LLP**
 Copenbarger – Attorneys at Law
 Voorhees Copenbarger & Voorhees LLP - RIA



Letter from Lloyd Copenbarger and Tim Voorhees

For more than 30 years, we have helped donors redirect tax savings to charity. We have both led firms that have each raised more than \$1 billion for charities. We now have a team of lawyers and CFPs® available to serve your donors. We use our proprietary software to integrate planning instruments and illustrate ample cash flow for each donor’s lifestyle, family, and favorite charities.

We achieve our success by always putting the donor first. As explained in this brochure, we show how each donor can maintain secure retirement income while transferring the appropriate amounts to children or other non-charitable beneficiaries. We then show how the balance of the assets must fund social causes through involuntary philanthropy (taxes) or voluntary philanthropy (gifts the donor’s favorite charities). When clients see how voluntary philanthropy need not reduce funds available for retirement or family, the clients routinely update legal documents to direct millions to the charities that make the advanced planning concepts available.

Donors and charities appreciate how we offer a comprehensive turn-key system for making advanced planning techniques available. First, we have dozens of slide shows, videos, and brochures to help donors appreciate the giving opportunities. Second, our back office has helped hundreds of donors integrate charitable planning techniques with non-charitable estate and financial planning instruments. Third, we have proven training workshops for board members, donors, and affiliated advisers. Fourth, our web-based case tracking resources are unparalleled. You can visit a password-protected web site to monitor 24/7 what gifts your charity can expect this year from current gifts and maturing testamentary bequests.

Our plans project more than \$1 billion per year of charitable gifts. By uniting your board and planning professionals around a clear plan for helping donors minimize taxes, your institution can accumulate substantial amounts of wealth that donors would otherwise waste on unnecessary taxes.

We have an introductory plan to help a limited number of charities raise \$5+ million when they commit to a retainer of \$2,500 per month. Each charity should not have to write a check after the first month because we count revenue from new clients and referring advisers toward this \$2,500 commitment. This brochure explains how we help you generate current gifts that should easily exceed your \$2,500/month commitment (\$30,000 per year) to our law firm. We guarantee current gifts of more than \$60,000 per year. Please call us at 800-447-7090 to discuss how we can help you raise \$5 million or more while generating current gifts at least double your commitment to us.

Best regards,

Lloyd Copenbarger

Tim Voorhees

Lloyd Copenbarger, JD, LLM

Tim Voorhees, JD, MBA

18200 Von Karman, Suite 200 • Irvine, California 92612 • Phone (949) 878-9400 • Fax: (949) 878-9401
 Website: www.CopenbargerVoorhees.com

BENEFITS OF OUR PLANNING PROCESS

Americans plan to transfer from \$41 trillion to \$136 trillion of wealth to the next generation. The government plans to tax this transfer with 45% estate taxes and other taxes unless you act now. We can show your donors how to stop paying so much in taxes. We illustrate how donors can redirect tax money to their favorite charities without reducing money available for retirement income or gifts to loved ones. Here are examples from seven typical cases:

	Increased Income Tax Deductions	Increase To Heirs	Increase To Charity	Estate Tax Saving
Client 1	\$ 322,080	\$ 4,381,362	\$ 6,887,378	\$ 3,035,712
Client 2	\$ 486,475	\$ 119,623	\$ 4,304,322	\$ 2,931,200
Client 3	\$ 530,902	\$ 4,488,873	\$ 13,718,933	\$ 8,253,384
Client 4	\$ 368,239	\$ 1,337,351	\$ 808,895	\$ 2,119,857
Client 5	\$ 940,577	\$ 6,830,426	\$ 13,340,482	\$ 11,673,976
Client 6	\$ 4,159,147	\$ 7,381,307	\$ 23,485,508	\$ 27,335,629
Client 7	\$ 304,782	\$ 25,569,589	\$ 3,222,171	\$ 27,423,725

Our planning process can help your donors:

Control All Wealth – by employing strategies that:

- ▼ Eliminate estate and/or gift taxes
- ▼ Reduce or eliminate income taxes
- ▼ Protect assets from creditors
- ▼ Pass the full value of an estate to heirs
- ▼ Redirect tax money to a donor's favorite charities

Move from Success to Significance – through a planning process that aligns financial and legal plans with donors' vision for pursuing goals such as these:

- ▼ Making charitable gifts instead of paying taxes
- ▼ Involving family members in benefiting the community

Assemble a Highly-Skilled Planning Team – that enables you to:

- ▼ Engage nationally-respected attorneys through a simple process

- ▼ Benefit from the depth of experience of advisers who specialize in unique strategies for wealthy families
- ▼ Work with planners who understand the complexities of Multi-disciplinary Planning

Obtain a Full-Color Plan Illustrating All of the Proposed Tools

- ▼ Receive comprehensive client presentations that illustrate and integrate the effects of all proposed strategies on cash flow, taxes, charitable giving, and wealth distribution
- ▼ View attractive and easy-to-follow graphs, tables, and text reports
- ▼ Maintain financial and estate information in a format that can be updated easily during quarterly or annual reviews

DESCRIPTION OF RESOURCES

33. Login for vTasker Case Tracking.

Donors and all of the advisers on the donor's team can see all planning documents at one place, available 24/7. We use highly-secure and proven technology to add a highly efficient virtual dimension to the planning process.



34. Login for vBlueprint.com Software.

In a password protected lockbox, members can access more than 50 customizable documents in an MS Word, PowerPoint, or Excel format.

35. Success Guarantees.

We review research from successful development programs around the country. We then work with you to develop an action plan for uniting your board and affiliated advisers around a plan to attract and motivate donors. The plan reviews how your affiliated advisers can serve the donors while documenting dramatic increases in current and deferred gifts for the charity.

36. Custom Web Site to Track Expected Gift Revenue.

You can monitor the success of your giving program on a daily basis. We track all current and deferred gifts using a digital dashboard. Our technology allows us to apply national averages when calculating the amount of your testamentary gifts that should

mature yearly. Knowing the impact of the giving program helps your budgeting and helps show a compelling return on time and money invested in the giving program.

37. Guidance in Developing a Planned Giving Committee.

Too many planned giving programs fail because professional advisers compete for donors and fail to give donors uniform and high quality services. The solution involves creating a planned giving committee of your board to establish and maintain objective quality control and teamwork standards. We show you how.

38. Church/Charity Seminar Video.

Too many donor presentations are stale. We overcome this problem by offering engaging videos customized for your organization.

39. Custom Brochures for Donors.

Our technology allows us to customize brochures for particular groups of donors. We help you "triage" your donors into distinct groups that all receive value regardless of their net worth.

40. Custom Training Workshops for Donors.

Our Best Legacy Workshop receives outstanding reviews from families and charities. We can customize this to help your donors find practical solutions to challenging issues that arise when passing on values and wealth to family members and favorite charities.

DESCRIPTION OF RESOURCES

26. Value Proposition Letter. This two-page letter summarizes the client's current situation and compares it with potential results of a planning process. Advisers use the VPL to show a client how the benefits of planning are hundreds of times greater than the costs. The VPL is typically presented along with an engagement letter for Phase 2 planning.

27. Charity Member Program. A Charity Member may enter into formal relationships to share

Copenbarger & Voorhees LLP back office resources with CPAs, lawyers, or other referral sources. Because contracting

with these referral sources and equipping the referral sources can consume much time, only Charity Members receive active help with generating more leads from their referral network.

28. Semi-Exclusive Territory. We agree to license only a select number of charities to take advantage of the resources in this brochure.

29. Subsidized Memberships. A Charity can bring on affiliated advisers who pay a monthly fee to access the resources in this brochure. If 10 advisers pay \$250/

month, the charity has offset all of the \$2,500/month obligation required to get the guarantee of \$5,000/month of current gifts and \$5 Million of deferred gifts.

30. Custom Web Site. To market our zero-tax planning message to wealthy donors, CV has created a highly-polished web site, containing more than 70 pages of useful resources. CV can customize this web site using graphics and color standards provided by any member. You can review prototypes of this web site at vCV.com and other URLs.

31. Deliverables Link. Any CV member can add a link to his or her web site that will take a prospective donor to downloadable samples of deliverables that the member prepares with support from the CV planning staff. This list includes items such as a Family Wealth Statement, Financial Check-Up, a Tactical Plan that illustrates a single sales idea or a Comprehensive Family Wealth Blueprint® that integrates a group of strategies into a single analysis with integrated tax, cash flow, and wealth distribution reports. We customize these materials with the member's brand image.

32. Best Practices Documents. A robust web site provides access to a broad array of practice management ideas from the Best Practices Workshop. It includes more than 100 documents, including resources for engaging clients, conducting a family retreat, and developing a Family Wealth Statement.

	CURRENT PLAN	WEALTH CONTROL PLAN
INCOME TAX DEDUCTIONS	-	\$ 3,057,050
HEIRS RECEIVE IMMEDIATELY	\$ 11,631,060	\$ 13,867,345
PV OF FUTURE BENEFITS TO HEIRS FROM CLATS	-	\$ 5,442,282
FAMILY FOUNDATION	-	\$ 11,193,585
ESTATE TAX	\$ 10,268,940	-
WEALTH CONTROL PLAN SUMMARY		
INCREASED INCOME TAX DEDUCTIONS		\$ 3,057,050
INCREASED NET TO HEIRS		\$ 7,678,568
INCREASE TO FAMILY FOUNDATION		\$ 11,193,585
ESTATE TAX SAVINGS		\$ 10,168,940

ILLUSTRATE AMPLE CASH FLOW FOR DONORS' RETIREMENT, FAMILY, AND CHARITIES



Lifestyle



Business Investment



Charity



Education



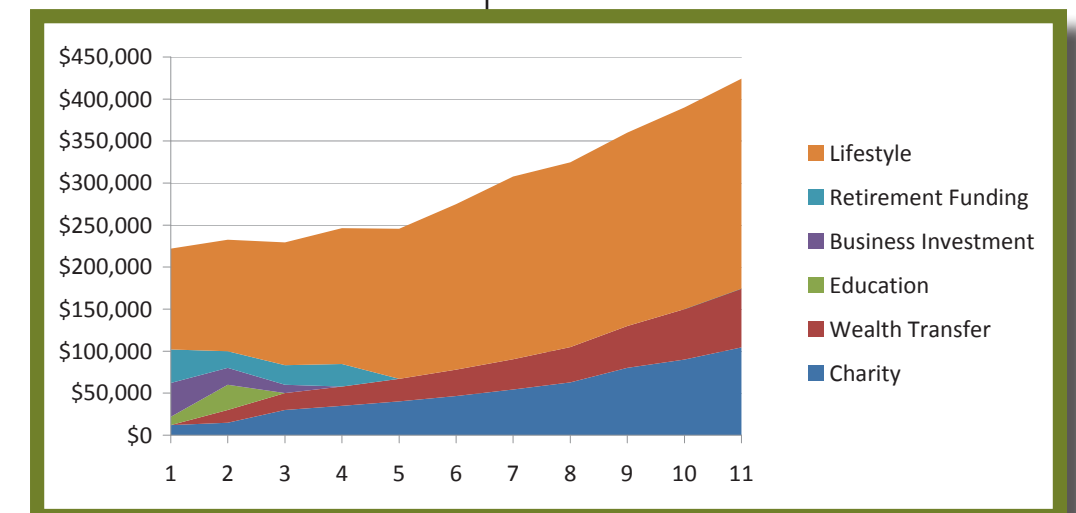
Retirement Funding



Family Wealth Transfer

Our process begins with the vision of each donor that we serve. We help the donor clarify how much capital he or she will need throughout his or her lifetime. We also determine how much wealth should transfer to family members using current and testamentary giving techniques. Throughout this process, we typically illustrate how donors can generate substantial income tax, gift tax, and estate tax savings.

Donors find great joy in freeing up tax savings for retirement income, transfers to family members, and gifts to charity. Donors delight in watching us illustrate new ways to "do your giving while you're living so you're knowing where it's going." By translating the donor's vision into realistic cash flow projections, we typically give donors ample assurance that they have the wherewithal to fund their favorite causes.



CASE STUDY: \$1 MILLION TESTAMENTARY GIFT AND A VISION OF GENERATING \$3 MILLION ANNUALLY

Thomas and Virginia Smith have calculated that they need \$150,000 per year to live very comfortably. They see that they can reasonably achieve this goal by spending earnings and principal from \$2 million of their assets. They have also determined that they want to give \$400,000 to each of their three children. They see that they can achieve this goal primarily by growing \$1,200,000 in an investment program.

THOMAS AND VIRGINIA



\$ 4,200,000 ESTATE ALLOCATED:
\$ 2,000,000 FOR RETIREMENT
\$ 1,200,000 FOR FAMILY
\$ 1,000,000 TO CHARITY

Given that the Smiths can realize financial freedom with \$2 million and fund a family legacy with \$1.2 million more, the Smiths only need \$3.2 million of their net worth. Because Thomas and Virginia have built a successful business, they have a net worth of \$4,200,000.

Solutions

The Smiths have at least \$1 million more than they need for themselves and their children.

The Smiths' Wealth Adviser showed them how charitable trusts could help provide the most tax-efficient retirement income streams and transfers to family members. Their plan gives a comfortable nest egg for their heirs without estate and gift taxes. The plan also frees up \$1 million to gift to charity.

Result

The Smiths were delighted to see that they could make pledges now to give a testamentary \$1 million gift to their favorite charity. In addition to having the satisfaction of seeing their hard-earned wealth benefit worthwhile causes, the Smiths realized these personal goals:

- ▼ Reduced federal estate taxes
- ▼ Funded favorite charities
- ▼ Generated an income tax deduction
- ▼ Protected assets from creditors
- ▼ Diversified their assets tax-free
- ▼ Maximized tax-free compounding
- ▼ Managed the timing of taxable income

When giving \$1 Million to each charity, the Smiths were inspired by this vision:

A charity with 100 donors giving \$1,000,000 testamentary gifts can raise \$100 Million. If donors are over age 50, then 3% can mature each year, resulting in \$3 Million annually of cash for the charity.

Copenbarger & Voorhees LLP
attorneys at law

DESCRIPTION OF RESOURCES

20. Opportunity Conversations. Tim Voorhees and his team will strategize with Members at reduced rates to develop donor plans. This assistance with client plans is possibly the most valuable service offered by Copenbarger & Voorhees LLP. Moreover, Tim Voorhees and his staff will provide practice management consulting or technical advice to equip advisers build upon the success of wealth counselors with profitable practices.

21. Tactical Plans. A Tactical Plan is a strategy illustration that focuses on just one or two strategies and demonstrates how the strategy can reduce taxes, increase income, or achieve other benefits. Our web-based software can illustrate 20+ tactical plans. Our back office illustrates 400+ tactical plans.

22. Comprehensive Plans. A Comprehensive Plan (or "Family Wealth Blueprint[®]") is a donor report that illustrates the benefits of three or more strategies. It presents the results in pictures, charts, text, and numbers. The Comprehensive Plan takes into consideration the cumulative impact of all strategies with respect to income taxes, cash flow, charitable benefits, and wealth distribution. It is usually 50-120 pages in length.

23. Summary Blueprints. The Basic Blueprint contains all of the elements in a Wealth Blueprint except the annual cash flows and Summary of Benefits to Heirs. The Summary Blueprint contains all of the elements in a Wealth Blueprint except the annual cash flows. All Blueprints typically show how integrating three or more planning instruments will affect balance sheet and estate distribution numbers.

24. Family Retreat and Wealth Statement. Tim Voorhees shares his experience and expertise in conducting family retreats. You can learn how to help a husband and wife unite around a compelling purpose and establish parameters for choosing planning instruments that will help fulfill the purpose. We show how to summarize retreat conclusions in the Family Wealth Statement and Value Proposition Letter.

25. Financial Check-Up. This document examines how well the client is fulfilling his or her goals regarding investments, wealth transfer, income tax, asset allocation, business succession, retirement planning, etc. The report helps to demonstrate the need for planning by highlighting the difference between what a client wants to accomplish and what the client's current plan actually does.



DESCRIPTION OF RESOURCES

12. Best Tools Workshop (and CE course).

This fast-paced, marketing-oriented program reviews approximately 20 cutting edge strategies. This is a one-day survey course. Attendees receive a professionally-developed workbook, which has been approved for continuing education.



13. Best Portfolios Workshop. This 6-hour program addresses some of the best practice management used by top portfolio managers. Topics cover the entire spectrum of practice including marketing, charging fees, development of investment proposals, creation of investment policy statements, tracking portfolios online, producing monthly and quarterly investment reports, and integrating portfolio design into estate design procedures and plans.

14. Best Legacy Workshop. Experience proves that America's 8 million millionaires should all share excitement about the topics reviewed in our Best Legacy Workshop. As our advisers meet with clients to discuss wealth planning, we continually see a huge need for spiritually-centered training about God's purpose (calling), God's Peace (conflict resolution), stewardship (e.g., wealth optimization), and discipleship (e.g., mentoring). We cover these topics in the Best Legacy Workshop scheduled at destination resorts. This program

inspires families to redirect tax money to favorite charities. Advisers or institutions who help host this event typically enjoy substantially greater interest in planned giving resources

15. Live Technical Webinars. At least quarterly, we review hot topics involving planning strategies, product developments, tax laws, planning pitfalls, or practice management concepts.

16. Channel Adviser Study Group. Copenbarger & Voorhees LLP exists to promote professional development and collegiality among highly-trained advisers. To CVter this environment, we meet at least annually in a retreat setting. During this time, we share practice management tips, explain technical concepts, and review the best marketing, planning, and training resources.

17. Newsletters. At least quarterly, Tim Voorhees prepares a newsletter sharing success stories and discussing how member firms make the best use of CV resources. Members can private label these for use in their practices.

18. Recorded Video Library. We have more than 100 recorded videos and webinars to explain how we run our practice successfully. For a partial list of video topics, *see* <http://www.vfos.com/videos>.

19. Coaching. We have experienced coaches available to help you develop and execute your development plan.

This brochure reviews the benefits of becoming a Charity Member of Copenbarger & Voorhees LLP, Inc. ("CV"). Charity Members gain access to a robust menu of marketing, training, technology, and case support products and services designed to generate substantial charitable gifts. Charity Members should not have to pay for these services because our program is funded with payments from donors and/or advisers referred by the Charity Member.

The grid below lists the benefits available to the select few Christian charities that receive the Charity Member benefits. Copenbarger & Voorhees LLP works with each Charity Member to generate current and deferred gifts far in excess of the monthly commitment made by the charity.

To help each charity generate current gifts double the amount of the monthly retainer, we offer 40 valuable resources. These resources can also help each charity generate millions of deferred gifts. We provide live and recorded webinars to explain how your charity can use the resources below to help donors redirect millions of tax savings to their family members and your charity.

Family Office Resources	Descriptions of 40 Resources		Family Office Resources	Descriptions of 40 Resources		
Adviser Marketing Products and Services	1	Custom Presentation Materials Package	Adviser Case Planning	20	Opportunity Conversations	
	2	Strategy Flyers		21	Tactical Plans	
	3	90 Second DVD for Promotional Purposes		22	Comprehensive Plans	
	4	Seminar Workbooks		23	Summary Blueprints	
	5	"Soft Data" Questionnaires		24	Family Retreat and Wealth Statement	
	6	"Hard Data" Fact-finders		25	Financial Check-Up	
	Adviser Training	7	Donor Engagement Kit	Adviser Rights	26	Value Proposition Letter
		8	Sales Seminars, Webinars, and Follow Up Meetings to Help Engage Donors		27	Charity Member Program
		9	vBlueprint Online Strategy Illustrator		28	Semi-Exclusive Territory
		10	Charity Member Marketing Webinars	29	Subsidized Memberships	
Adviser Training		11	Best Practices Workshop	Adviser Technology Resources	30	Custom Web Site
		12	Best Tools Workshop		31	Deliverables Link
		13	Best Portfolios Workshop		32	Best Practices Documents
		14	Best Legacy Workshop		33	Login for vTasker Case Tracking
		15	Live Technical Webinars	34	Login for vBlueprint.com Software	
		16	Channel Adviser Study Group	Charity Board Resources	35	Success Guarantees
	17	Newsletters	36		Custom Web Site to Track Expected Gift Revenue	
	18	Recorded Video Library	37		Guidance in Developing a Planned Giving Committee	
	19	Coaching	38		Church/Charity Seminar Video	
		39	Custom Brochures for Donors			
		40	Custom Training Workshops for Donors			

The list of resources on this page is subject to change without notice until the Charity Member agreements are signed. Please call 800-447-7090 or email info@copenbarger.com for details.

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HOW WE EQUIP YOUR DEVELOPMENT TEAM WITH THE BEST RESOURCES. WE PROVIDE:

1. Exclusive Access to Resources –

Copenbarger & Voorhees LLP (“CV”) works with a select group of charities to offer exclusive and comprehensive wealth planning resources. CV coordinates with your board to identify and equip qualified advisers who access proven resources for attracting and engaging high net worth donors. Advisers chosen as Allied Advisers can customize brochures, sample plans, web sites, training classes, and other

materials to provide turn-key resources to high net worth donors and prospects. Allied Advisers can have unparalleled credibility and support when generating referrals from CPAs, lawyers, charities, and other referral sources. Channel Members can provide high quality zero-tax planning, wealth

counseling, wealth blueprinting, and one-stop Copenbarger & Voorhees LLP not available elsewhere.

2. Wholesale Pricing on 40 Vital Resources –

Allied Advisers have access to the marketing, training, technology and wealth planning services of Copenbarger & Voorhees LLP at wholesale costs.

3. Leadership – This program is lead by Tim Voorhees, JD, MBA and Lloyd Copenbarger, JD, LL.M. Each of these men has helped to raise more than \$1 billion for charities through their independent law firms. They have joined forces to equip the development committee of a select few charity boards that have us customize the program described in this brochure.

4. An Experienced Team – Tim Voorhees, JD, MBA, heads Copenbarger & Voorhees LLP. 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. He has developed expertise in wealth counseling and blueprinting since entering the

financial planning profession in 1978. Since focusing on zero-tax planning in 1990, Tim has led teams that have planned more than 1,000 cases for clients with estate sizes ranging from \$3 million to over \$1 billion.

5. An Implementation Track Record –

CV works closely with experienced attorneys who are well versed in implementing wealth planning and charitable planning techniques. Moreover, CV has proprietary technology to illustrate the best insurance and investment solutions for funding each legal tool. Tim Voorhees and his team will work closely with Charity Members to help implement each plan. CV can document unparalleled success in creating and/or implementing approximately 100 high net worth plans each year.

6. Expertise in Multi-disciplinary Planning –

CV planners understand how to address issues that arise when teams of planners serve wealthy clients. Our Multi-disciplinary Planning (“MDP”) process has been approved by a wide array of CPA firms, law firms, RIAs, Broker-Dealers, and insurance professionals.

7. Ability to Focus On “A” Clients and Prospects –

Copenbarger & Voorhees LLP provide the opportunity to work with your “A” clients and prospects on a more regular basis. Wealthy individuals appreciate how you have access to the only software that facilitates easy re-optimization of plans in response to changing goals, balance sheet numbers, and tax laws. Your clients using the CV approach should readily agree to on-going annual retainers.

8. Resources Necessary to Offer One-Stop Planning –

The 21st century client needs one adviser who can coordinate investment, insurance, legal, accounting, and other professionals while minimizing all types of income and transfer taxes. The CV process offers a proven platform for integrating advice from all advisers in a format that lets the client easily monitor bottom-line results.

DESCRIPTION OF RESOURCES

6. “Hard Data” Fact-finders. The Fact-finder is a donor-ready booklet that members (or their affiliated advisers) can use when collecting financial, legal, insurance, and tax information from donors. Fact-finders are available in packages of 10.

7. Donor Engagement Kit. Any philanthropic adviser who wants to communicate the power of the wealth counseling process to wealthy clients and prospects can easily adapt these brochures for use in his or her practice. The Client Engagement Brochures include a high-quality presentation folder with pockets holding the hard data questionnaire, the soft data questionnaire, cases studies, biographies of planners, the engagement letter, and disclosure forms, such as the form ADV.

Sales Seminars, Webinars, and Follow Up Meetings to Help Engage Donors. Tim Voorhees conducts up to 3 client seminars in a day on behalf of Charity Members and/or advisers who bring one of our attorneys to their community. (We typically draw excellent crowds by holding these seminars during lunch, while serving hors d’oeuvres after work, or during dessert after dinner.) Through seminars, webinars, and follow up meetings we use proven techniques for inspiring donors to move from success to significance, realize the purpose for which they

were put on this earth, and leave the most meaningful legacy. We explain how Copenbarger & Voorhees LLP has the unique combination of tools and other resources to help donors experience the power of vision-inspired planning.

9. vBlueprint Online Strategy Illustrator.

Our web-based software allows Charity Members to customize more than 20 advanced planning instruments for referral sources. The customized plans inspire clients to combine charitable strategies with other advanced strategies, such as captive insurance companies, charitable trusts, IDIT, and retirement plan leveraging techniques.

10. Charity Member Marketing

Webinars. We help advisers position themselves as the premier providers of technical advice in their communities. Weekly webinars hosted for Charity Members can be adapted for use by any Charity Member in his/her community.

11. Best Practices Workshop. This 6-hour program is a concentrated program covering some of the best practice management ideas in the business. Topics cover the entire spectrum of practice including marketing, conducting family retreats, spotting problems with clients’ current plans, developing sophisticated strategies, building back office support, generating referrals, implementing plans, complying with legal guidelines, and training relationship managers. Members can attend in person or through teleconferences with web-supported graphics.



DESCRIPTION OF RESOURCES

- 1. Custom Presentation Materials Package (“CPM Package”).** This package contains 14 resources designed to help donors see the benefits of redirecting tax money to family and charity. The package includes customized sample tactical and comprehensive plans, slide shows, and other useful presentation tools for planned giving officers and professional advisers who do philanthropic planning.
- 2. Strategy Flyers.** We offer attractive 1 or 2-page flyers that describe the benefits of the most popular and powerful planning instruments. These can be customized to explain any of more than 400 planning strategies. The strategy flyers help donors appreciate how our process integrates charitable and non-charitable planning.

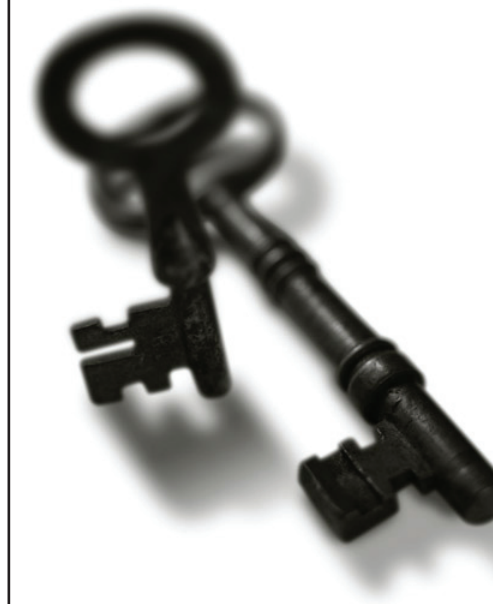
- 3. 90 Second DVD for Promotional Purposes.** Charity Members can use our scripts in a professional video studio to prepare short marketing videos. We help charities embed these in emails to send to donors and their advisers, as part of a turn-key marketing program designed to deliver professional quality video messages on a regular basis.
- 4. Seminar Workbooks.** Members can customize twelve unique brochures to explain how they offer planning resources in conjunction with CPAs, lawyers, and other referral sources. The brochures inspire donors to reflect their passions in statements of goals that are realized with any of 200+ services and 400+ planning tools that we make available.
- 5. “Soft Data” Questionnaires.** This professionally-developed “soft data” questionnaire asks approximately 50 probing questions about a donor’s values, vision, and dreams. Questionnaires are available in packages of 10.



WHAT PRODUCTS AND SERVICES ARE AVAILABLE THROUGH COPENBARGER & VOORHEES LLP?

- 1. Marketing Support.** Your affiliation with CV entitles your charity and its Allied Adviser to a comprehensive array of tools for presenting strategies to donors. Tools provided via hard copy, CD, and online will position you in the uppermost tier of the wealth planning profession. Only Charity Members can customize these unique resources.
- 2. Membership.** You receive a user name and password to access web-based resources for producing client deliverables. Virtual Advisers, Allied Advisers and Charity Members receive progressively greater access to web-based and live resources.
- 3. Planning Services.** Affiliation with CV gives Members access to the wealth planning services of CV and its affiliated lawyers and CPAs. Examples of these comprehensive-planning services include:
 - ▼ Family Retreat and Family Wealth Statement
 - ▼ Financial Check-Up
 - ▼ Value Proposition Letter
 - ▼ Tactical Plans
 - ▼ Basic and Summary Blueprints
 - ▼ Family Wealth Blueprint® – which includes a rich leather zipper binder with pages branded for the CV Charity Members
 - ▼ Best Practices Workshop
 - ▼ Best Tools Workshop – customizable marketing and presentation tools include:
 - ▼ A broad assortment of sample wealth strategy plans and presentations
 - ▼ Client questionnaires and fact-finders
 - ▼ A dozen distinct and professional client brochures

- ▼ Adviser brochures to help generate referrals
 - ▼ Articles on advanced planning topics for marketing to client advisers
 - ▼ Web site customized for your company
- 4. Adviser Training.** CV Charity Members receive on-going Best Practices and Best Tools training. This training equips your charity and its affiliated advisers to present the latest advanced investment, insurance, and charitable planning strategies. In addition, participating members are given the opportunity to interact with one another to share best practices and to provide input and ideas for enhancing services. Specific training programs and meetings include:
 - ▼ The Best Practices Workshop
 - ▼ The Best Tools Workshop
 - ▼ Technical Webinars
 - ▼ Customized consulting and CE courses – provided by CV and top lawyers



Note: Additional information on services is provided on the following pages.

WHAT BENEFITS DO CHARITY MEMBERS RECEIVE WHEN ACCESSING SERVICES THROUGH YOUR CHARITY?



1. Exclusivity: Only a select group of charities will have full access to CV resources. These charities can select an elite group of Virtual Advisers and Allied Advisers who will have access to the resources most needed by donors.

2. Financial Commitment: Charity Members can access an array of marketing, training, and planning resources at wholesale costs if they agree to generate \$2,500/month for Copenbarger & Voorhees LLP. CV works with Charity Members and their affiliated advisers to show donors how to redirect tax-savings to the charity. The charity and its Allied Advisers can access and customize resources not available elsewhere.

3. Multiple Revenue Sources: Charity Members can equip Allied Advisers and Virtual Advisers to implement plans involving legal documents, investments, insurance, and other sources of revenue. Under appropriate circumstances, all of these sources of revenue can offset the \$2,500/month obligation of the charity.

4. Collaboratives: Charity Members can use CV resources to develop a Planned Giving Committee of the board. The committee may include Virtual Advisers, Allied Advisers, and other members of the local financial legal community. The Planned Giving Committee members access CV resources and form collaborative teams that serve each donor. The team members can use

customized CV marketing materials to attract donors. If the donor wants confidentiality, CV and its affiliated law firm in Irvine will provide objective and confidential planning. If the donor wants a local adviser, CV will collaborate with a local Allied Adviser or Virtual Adviser to provide high-touch service. The Planned Giving Committee will oversee the collaborative teams serving each donor but confidential donor information will only be shared with the Planned Giving Committee to the extent authorized by the donor.

5. Virtual Back Office: Using state-of-the-art technology, the entire CV planning team serves the Member as if the planners were in “an office down the hall.”

		Descriptions of 40 Resources	“Seminar Only” Benefits (For charities scheduling a seminar but not making any revenue commitments)	\$1,500/Month Retainer Benefits	\$2,500/Month Retainer Benefits
			4 of 40 Resources	10 of 40 Resources	Up to 40 Resources
			No Guarantee	\$18K Annual Guarantee Plus \$500K Deferred Guarantee	\$60K Annual Guarantee Plus \$5,000,000 Deferred Guarantee
Adviser Marketing Products and Services	1	Custom Presentation Materials Package	Generic Bulletin Inserts with Only Seminar Date/Time/Location	Customized Presentation Materials	100+ Customized Sample Plans
	2	Strategy Flyers	Not Available	Limited Customization, Web-Based or Hard Copy	Unlimited Customization
	3	90 Second DVD for Promotional Purposes	Generic DVD with Only Seminar Date/Time/Location	Limited Customization, Web-Based or Hard Copy	100+ Scripts Available
	4	Seminar Workbooks	20-Page Workbook	Limited Customization, Web-Based or Hard Copy	Unlimited Customization
	5	“Soft Data” Questionnaires	Not Available	Limited Customization, Web-Based or Hard Copy	Unlimited Customization
	6	“Hard Data” Fact-finders	Not Available	Limited Customization, Web-Based or Hard Copy	Unlimited Customization
	7	Client Engagement Brochures	Generic DVD with Only Seminar Date/Time/Location	Limited Customization, Web-Based or Hard Copy	Unlimited Customization
	8	Sales Seminars, Webinars, and Follow Up Meetings to Help Engage Clients	Not Available	\$4,000/Day; \$400/Hour	Free webinars and follow-up meetings with experienced Christian laws and financial planners.
	9	vBlueprint Online Strategy Illustrator	Unlimited Access	No	Unlimited Access for Charity Members
	10	Charity Member Marketing Webinars	Not Available	\$400/Hour	2 Per Month Included
Adviser Training	11	Best Practices Workshop	Not Available	\$250/Day	Included
	12	Best Tools Workshop	Not Available	\$250/Day	Included
	13	Best Portfolios Workshop	Not Available	\$250/Day	Included
	14	Best Legacy Workshop	Not Available	\$250/Day	Included
	15	Live Technical Webinars	Not Available	Included	Included
	16	Channel Adviser Study Group	Not Available	\$250/Day	Included
	17	Newsletters	Not Available	Non-Customized	Unlimited Customization
	18	Recorded Video Library	Unlimited Access	Unlimited Access	Unlimited Access
	19	Coaching	Not Included	Included	Included
Adviser Case Planning	20	Opportunity Conversations	Not Available	\$300	1 Per Month Included
	21	Tactical Plans (\$1,000 - 5,000 value)	Not Available	\$500-3,500	\$500-3,500
	22	Comprehensive Plans	Not Available	\$8,000-30,000	\$8,000-30,000
	23	Summary Blueprints (2)	Not Available	\$5,000-10,000	\$5,000-10,000
	24	Family Retreat and Wealth Statement (\$3,500 value)	Not Available	Free with Web-Based Software	Free with Web-Based Software
	25	Financial Check-Up (\$3,500 value)	Not Available	Free with Web-Based Software	Free with Web-Based Software
	26	Value Proposition Letter (\$1,000 value)	Not Available	Free with Web-Based Software	Free with Web-Based Software
Adviser Rights	27	Charity Member Program	Not Available	Sign up Virtual Advisers	Sign up Virtual Advisers plus 6 Allied Advisers: CPAs, JDs, etc.
	28	Semi-Exclusive Territory	Not Available	Negotiated	Included
	29	Subsidized Memberships	Not Available	Not Included	Included
Adviser Technology	30	Custom Web Site	Not Available	Call	\$1,000/Year
	31	Deliverables Link	Not Available	Not Included	Included
	32	Best Practices Documents	Not Available	Some can be Customized	100% can be Customized
	33	Login for vTasker Case Tracking	Not Available	Included for 20+ Clients	Included for 100+ Clients
	34	Login for vBlueprint.com software	Not Available	Unlimited Access	Unlimited Access
Charity Board Resources	35	Success Guarantees	No Guarantee	Guarantee \$500,000 of Deferred Gifts and \$30,000 of Current Gifts	Included
	36	Custom Web Site to Track Expected Gift Revenue	Not Available	Can be Licensed	Included
	37	Guidance in Developing a Planned Giving Committee and/or Expert	Not Available	Custom Coaching Available	Included
	38	Church/Charity Seminar Video	Only a Standard Video for Pastors	Can be Licensed	Included
	39	Custom Brochures for Donors	No Guarantee	Can be Licensed	Included
	40	Custom Training Workshops for Donors	Not Available	Can be Licensed	Included