Family OFFICE SERVICES

COACHING PROGRAM

The Coaching Program is Designed to Help You

» **Identify your best new revenue opportunities now**

» **Implement marketing and sales strategies immediately**

» **Chart a course to work effectively with much higher net worth clients and their professionals**

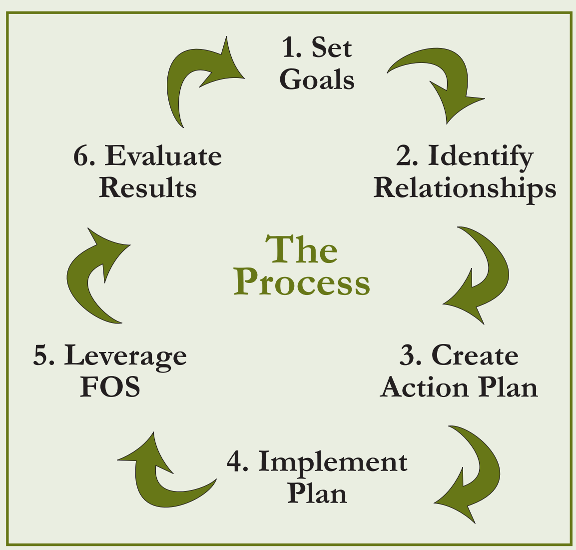
Act Now! We will help you engage clients for new fees substantially greater than what you pay us for mentoring. Call us at 800-447-7090 to discuss how you can receive great value from your investment in coaching.

Key Benefits

- Define your ideal client
- Get in front of higher net worth clients with a relevant message
- Identify your unique skills and passions
- Concentrate your efforts on high payoff activities
- Begin a systematic pattern of skill development
- Tap into solutions to help you overcome obstacles
- Receive accountability to keep you focused
- Access 40 powerful resources for building a successful practice (See www.ZeroTaxplan.com)
- Learn best practices from nationally recognized experts
- Increase your profitability
- Get better referrals from other advisers

The Process

1. Set Goals: Identify your ideal client.
2. Identify Relationships: What clients, professional advisers, and organizations may be able to help pave the way to success? We will help you evaluate each one and provide guidance as to which may be the most productive.
3. Create Action Plan: Plan targeted marketing and sales strategies. We will help you determine the best approach for each person on your list.
4. Implement Plan: We will be available to help guide you and determine each step along the way.
5. Leverage FOS: Working together as a team, we can be on the phone with you to help initiate engagements with clients, prospects, professional advisers and organizations.
6. Evaluate Results: We will help you identify what worked best and how to replicate success.



Things You Will Learn

- How to determine if a lawyer, accountant or financial adviser are good prospective strategic alliance partners
- How to customize valuable client-ready deliverables to communicate value to every prospect or client wanting to redirect taxes to family or favorite charities
- How to use the FOS resource library of marketing brochures and client development tools
- How to augment your initial consultation to showcase your new capabilities
- How to add new capabilities to your capabilities story without risking traditional business
- How to get clients to authorize you to lead a collaborative team
- How to get the client's other advisers to work with you in a mutually beneficial way

What Is Included?

- One mentoring session with Tim Voorhees or Dave Holaday each month (a $500 value!)
  - Timely insights prior to key meetings
  - Timely debriefings after meetings with focus on key follow up action steps
- All FOS practice development worksheets and tools

Get Started

1. Call Jana at Family Office Services to enroll (949-878-9403).
2. Sign credit card authorization. If you purchase one month at a time, the fee is $350 per month. If you sign a six month commitment, the fee is reduced to $300 per month. (This fee counts toward monthly obligations of Allied Advisers and Channel Members. Each month that a Virtual Adviser pays for mentoring, his or her membership fee of $250 is waived.)
3. Review the starter kit materials and prepare for your first call.
4. Schedule your first call.

About Us

Tim Voorhees, JD, MBA

One of the nation's leading authorities on wealth planning for affluent families, Tim consistently earns highest audience ratings as a frequent speaker and trainer at professional meetings and events for local, regional, and national groups of affluent families, philanthropic officers, and wealth advisers – including accountants, attorneys, investment advisers, and insurance professionals.

David Holaday, ChFC

With a national reputation for developing unique and comprehensive solutions for complex family situations, Dave assists professional advisers to design, analyze and illustrate zero tax plans. He often helps to facilitate effective collaboration among the client's existing tax, legal, insurance, and investment advisers.

"Holaday and Voorhees provide some shelter with well rounded experience and technical elegance, and create a new paradigm that brings promise to a financial industry emerging from the growth pains of the volatility storm."

–Matt Piercey, Piercey & Associates

"Such a wealth of knowledge and wisdom, not just tools, but resources to better position us to help clients and the ministries they support."

–Rusty Russell, Covenant Financial Solutions

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