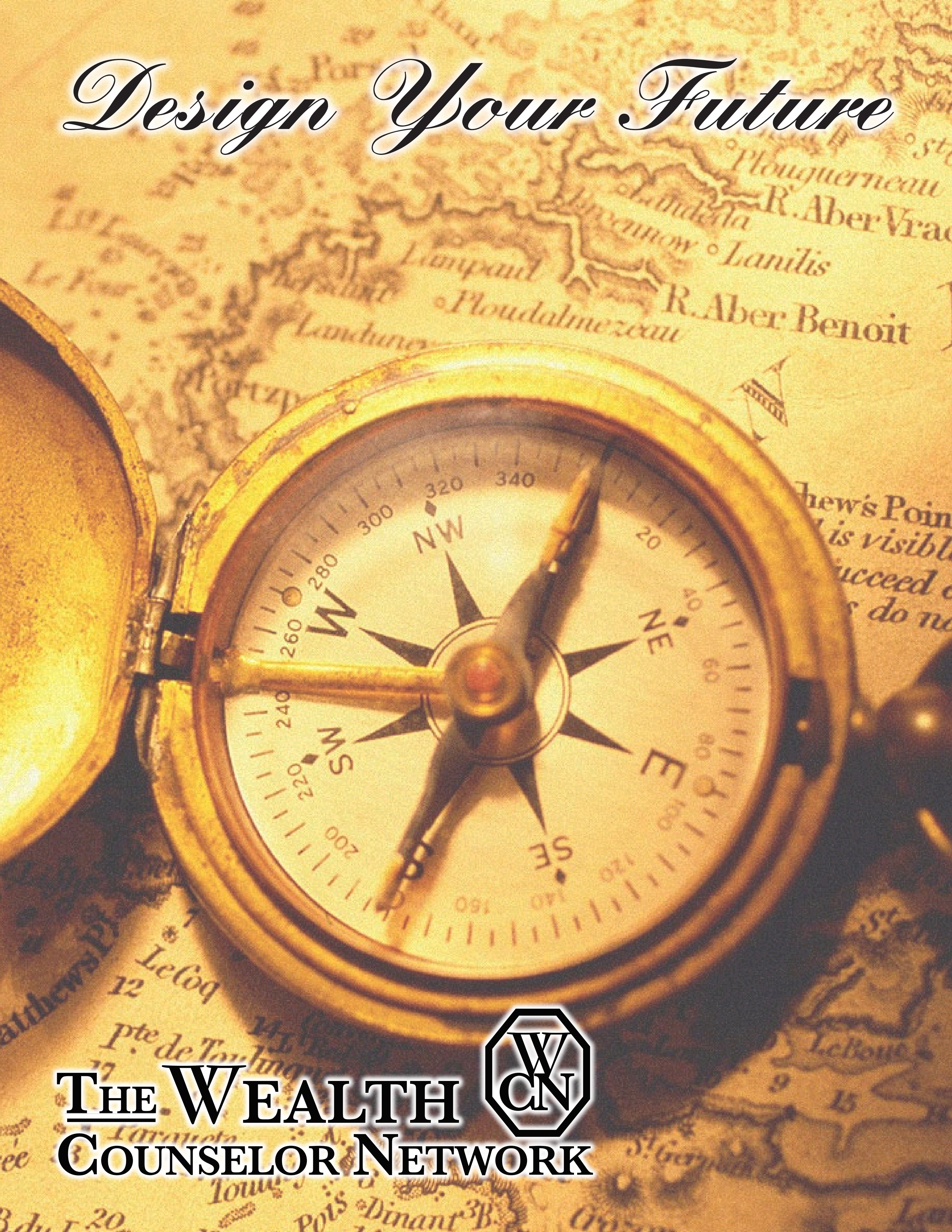
Design Your Future



The Wealth Counselor Network

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Turn-key Resources

We equip Wealth Counselors with essential marketing, training, software and case planning support so that you can immediately begin engaging high net worth clients.

Marketing. You can customize our marketing materials using our back office and/or our online illustration system ("vBlueprint"). The materials can motivate your prospects and clients to engage you for fees much greater than what you pay us.

Training. Our workshops give you direct access to the experts and connection to a community of like-minded professionals. Our hundreds of live and recorded webinars can expand your knowledge in a time and cost effective way.

Case Planning. We are here to help you when you open a case that requires significant back office resources and expertise.

Administration. Our case tracking system ("vTasker") helps you to keep track of the many implementation steps.

We equip you to help your clients with:

Minimizing Taxes

Accumuleting Wealth

Protecting Assets

The Process

When you and your planning team work with the Wealth Counselor Network, you can benefit from our proven 4-phase planning process.

Phase 1 Discovery

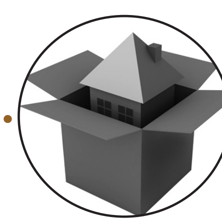
Phase 1 may involve a simple Strategy Session of a 4-8 hour Retreat.

Strategy Session - If you already have clarity about your clients goals, assets and legal documents, then you can schedule a 60-120 minute meeting or webinar with our experience planners. We will help your planning team identify insurance, legal, tax, and other tools that can help your client achieve his or her goals. After this initial meeting, we work with you to develop appropriate client deliverable. You may elect to use our online vBlueprint.com software to produce deliverables or you may engage our service bureau for help with more customized deliverables. The first deliverable may be a Financial Checkup, which evaluates up to eight different planning topics, including investments, insurance, income taxes, transfer taxes, business succession, retirement planning, charitable giving, and legacy planning.

Retreat - If you lack clarity about your client's situation, we can equip you to conduct a 4-8 hour retreat. During the retreat, you can clarify the clients goals and suggest solutions that should generate client benefits far greater than planning costs. The retreat can help guarantee plan implentation.

MANAGING RISK

NAMAGING CASH FLOW



INCREASING CHARITABLE GIVING POTENTIAL

Phase 2 Design

We equip you to present a plan designed for your client's specific situation. The plan is based upon the information collected during the Discovery stage. You can choose from several planning options:

Tactical Plan - If you have an immediate need to solve a problem or to find the right product, you may want to implement a tactical plan. Such a plan focuses on an easy-to-implement tactical tool that is calculated to address a major concern of your client.

Executive Summary Plan - If you want a plan That integrates tactical tools to address your client's primary planning needs, an Executive Summary Plan can provide a cost-effective solution without too many pages of details.

Comprehensive Plan - If your client has complex needs or sophisticated advisers, you will probably need to Integrate several strategies into a plan with integrated cash flow and wealth transfer calculations. The comprehensive plan addresses all the major components of planning in an impressive deliverable with more than 20 features that should set you apart from the competition.

When developing a comprehensive plan, we will help you recommend detailed wealth management strategies for meeting your client's long-term goals. The 'Wealth Counselor Network planners can integrate any of more than 500 planning instruments while focusing on bottom-line client benefits that far exceed the costs.

PHASE 3 IMPLEMENTATION

After you have participated in the planning process and illustrated the best strategies, the next step is to implement the plan. This involves setting up the legal documents and acquiring the appropriate financial products and services. We can conduct webinars or otherwise support your client's CPA, attorney, and other planning team members in an united effort to facilitate plan implementation.

COORDINATING ESTATE DISTRIBUTION

MANAGING FAMILY BUSINESS SUCCESSION

MAINTAINING CONTROL OVER PERSONAL AFFAIRS

Offer Zero Tax Planning!

Please replace text in this column with the following:

We often produce dramatic client benefits by integrating charitable and non-charitable tools. This synergistic process is known as Zero Tax Planning. For nearly 20 years, we have used this powerful concept help advisers transform their practices while bringing clarity, vision, simplicity and meaning to their clients. If you are a professional adviser, you can attend our Zero Tax Institute and learn to replicate our success in helping clients direct tax savings to family and favorite charities.

Why Zero Tax Planning?

- Make compelling marketing presentations
- Open more big cases
- Exploit significant revenue opportunities
- Direct millions to charities and receive new client referrals from charities
- Gain competitive advantage
- Learn from advisers who earn top 1% income by incorporating Zero Tax Planning into their practices
- Is Zero Tax Planning appropriate for your practice?
- Do you want to attract more clients with net worths of $1 million and much higher?
- Do you want to be perceived as more than a product or transaction person?
- Do you want to position yourself as a trusted adviser bringing visionary leadership?
- Do you want to be more of a catalyst for positive change in the lives of your clients and the community?

If you answered yes to these questions, please contact us at HYPERLINK “mailto:info@WealthCounsel.net” info@WealthCounsel.net or call 800-447-7090

THE WEALTH COUNSELOR NETWORK

For more information about the Wealth Counselor Network please contact us at 800-447-7090

Securities and advisory services offered through the Tax Efficient Asset Management Solution, Inc., a federally-registered investment advisory firm, and its affiliated law firm.

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