Redirecting Tax Savings to Retirement, Family and Charity

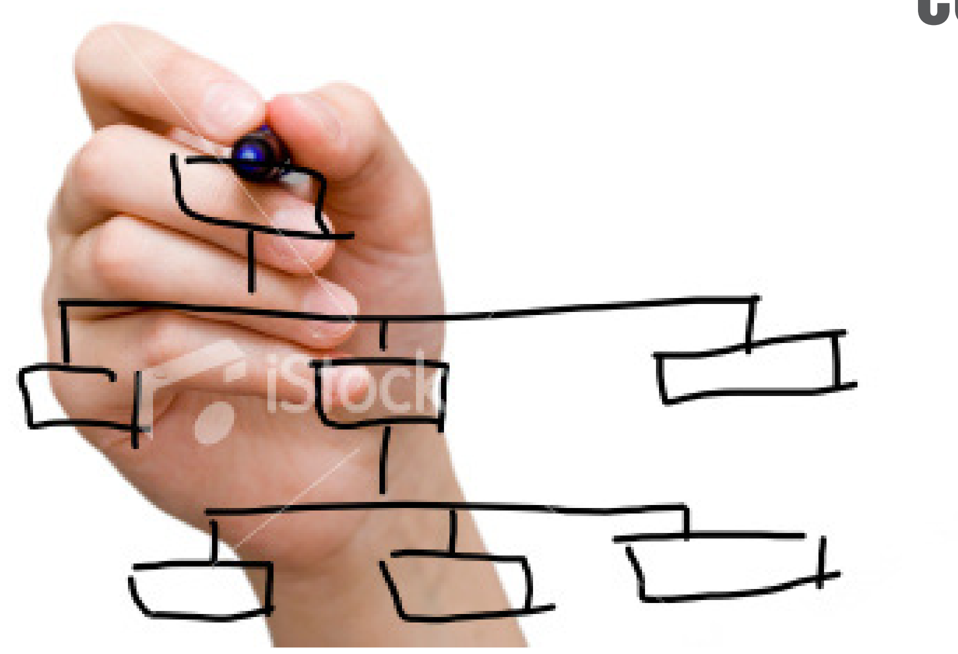
Enhance your practice by offering Zero Tax Planning!
Zero Tax Planning is a simple but powerful concept that can transform your practice and bring clarity, vision, simplicity and meaning to your most affluent clients.

The only two-day program that covers the full spectrum of the essential information you need to know to begin marketing and implementing cases immediately.

Is Zero Tax Planning right for your practice?

- Do you want to attract more clients with net worths of $10 million and much higher?
- Do you want to be perceived as more than a product or transaction person?
- Do you want to generate a steady flow of referrals from charities?
- Do you want to offer valuable services that CPAs, lawyers, and traditional financial planners do not offer?
- Do you want to access turn-key marketing and planning resources so that you can generate profits immediately after attending our two days of training?

If you answered yes to these questions, we invite you to learn more about how the Zero Tax Planning Institute can help you build your practice.



CONVERTING TAX DOLLARS INTO RETIREMENT INCOME FAMILY BENEFITS & CHARTIBLE GIFTS

You will learn to:

- Access systems used to fill seminars rooms routinely with 100+ prospects
- Inspire nearly all seminar attendees to sign up for initial meetings
- Communicate more compelling "value propositions" and successfully enter into more fee engagements.
- Help your client's existing advisers feel good about working with you
- Use web-based technology to develop powerful client presentations
- Gain access to a library of vides to train your staff to provide stellar client service
- Develop systems to generate high levels of predictable revenue from each seminar even
- Stand apart from the competition
- Deliver more value to your clients and help them feel good about paying you fees
- Identify new business opportunities
- Generate more referrals
- Enhance plans with advanced estate planning solutions
- Deliver compelling marketing concepts that capture client attention
- Convert prospects into clients during the first meeting
- Impress prospects with advanced family wealth transfer techniques
- Motivate donors with advanced charitable planning techniques
- Overcome competition with advanced retirement planning techniques
- Present advanced planning techniques clearly to your clients
- Develop a marketing plan to reach prospects, referral sources and organizations
- Implement more insurance strategies by avoiding gift taxes on large insurance premium payments
- Generate large income tax deductions as part of year-end income tax planning
- Spot hidden life insurance opportunities
- Gain more referrals for lawyers on each planning team
- Learn how you can tap into a market of 8+ million clients who will probably need to move assets to irrevocable trust after 1/1/2011.
- Gain access to turn-key marketing, case planning, and case tracking technologies.

In addition to the many benefits of attending the Zero Tax Institute, all attendees will receive a sample plan for each of the primary tools discussed during the program. Each sample plan will include a flow chart and basic supporting text and calculations.

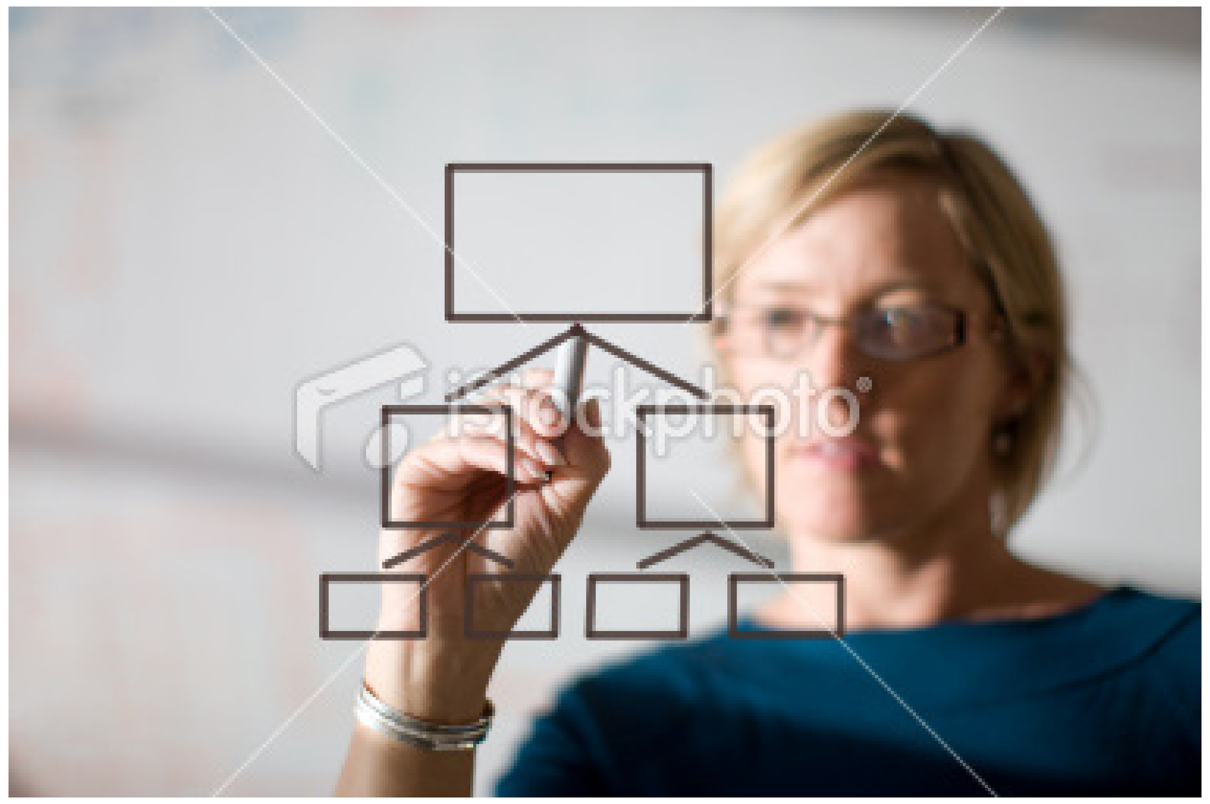
DAY 1

8:30 AM	**9:45 AM**	Welcome and Introduction What is Zero Tax Planning?
9:45 AM	**10:00 AM**	BREAK
10:00 AM	**11:00 AM**	"Developing effective relationships with referral sources Following a proven workflow to achieve seminar success! Scheduling productive meetings with all seminar attendees"
11:00 AM	**11:15 AM**	Break
11:15 AM	**12:15 PM**	"Charging fees based on value: getting paid for your wisdom Setting yourself apart with power questions during Discovery Sessions Getting others advisers to sell you!"
12:15 PM	**1:30 PM**	Lunch
1:30 PM	**2:30 PM**	Herding cats: be the leader others will be glad to follow Control the case by bringing a proven process
2:30 PM	**2:45 PM**	Break
2:45 PM	**4:05 PM**	"Making more compelling sales presentations Leading a charity workshop"
4:05 PM	**4:20 PM**	Break
4:20 PM	**5:30 PM**	"Delegating the details Gaining efficiency and effectiveness with web-based case tracking; Avoiding compliance fouls"

DAY 2

8:30 AM	10:00 AM	Top 5 Zero Tax Strategies you Must Know
10:00 AM	10:15 AM	BREAK
10:15 AM	11:45 AM	Customizing estate planning instruments with web-based resources; Presenting sample plans; Integrating advanced family wealth transfer strategies
11:45 AM	1:00 PM	Lunch
1:00 PM	2:30 PM	Charitable planning strategies with sizzle
2:30 PM	2:45 PM	Break
2:45 PM	3:45 PM	Recognizing planning opportunities for qualified plans
3:45 PM	4:00 PM	Break
4:00 PM	5:00 PM	Making the best use of your virtual Family Office Services team

ENHANCE YOUR PRACTICE BY OFFERING ZERO TAX PLANNING!



ZERO TAX
PLANNING INSTITUTE
REGISTER NOW AND SAVE

Register now! Prepare to update every plan when we return to the 2001 tax rates on 1/1/2011!

The two days of training costs only $995. This price includes more than 20 marketing and case planning resources so that you can replicate our success. We will show you how to conduct seminars and profitably serve attendees. You can start earning a return on your investment promptly after the first meeting.

Register by 8/15/2010 and receive a $250 discount. You pay only $745 for two days of training and 20 valuable resources for turn-key success.

The entire training fee applies toward the cost or our Allied Adviser membership program. This program equips you with 40 advanced marketing, training, planning, and technology solutions. Email info@vfos.com to request a brochure.

Venue information

Payment explanation

SPEAKERS

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.

Dave 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.

Family
OFFICE SERVICES

Zero Tax Planning is a program of Family Office Services
www.vfos.com
8200 Von Karman | Suite 200, | Irvine, CA 92612
Phone: 800-447-7090 | Fax: 866-447-7090