What Makes Us Unique:

- Our CAPABLE team cares more about your dreams and aspirations than your assets.
- Our highly-capable team has planned hundreds of cases using a proven planning process.
- Our concierge relationship manager will follow through on all the details to help simplify your life. We can provide 24/7 access to your planning information through our highly secure virtual concierge at www.vfos.com.
- Our proprietary software integrates innovative planning instruments in a plan optimized for you with detailed annual balance sheet and cash flow numbers through life expectancy.
- We implement! We have a track record documenting how we have generated billions of dollars in benefits on hundreds of cases.
- We provide a free discovery session and a "Value Proposition Letter" to show you the benefits and costs of planning before you engage us for planning.

Our Mission: "To help you realize your vision by implementing a comprehensive lifetime wealth blueprint for minimizing taxes and maximizing the value of your estate, your business, and transfers to your family members and/or favorite charities."

The Twelve Most Requested Family Office Services	
Counselors	1. Clarification of Vision and Mission, Decision-making Processes, Ranked Priorities/Principles, Provisions for Heirs, and Plans to Prepare Successors/Heirs
Analysts	2. Documentation and Reporting
Planners	3. Transfer of Control/Mgt/Ownership/Cash Flow 4. Comprehensive Cash Flow/Inheritance Planning
Adviser Coordinators	5. Coordination of Trust Maintenance 6. Coordination of Philanthropic Projects
Binders/Publishers	7. Comprehensive Illustrations and "Blueprints"
Licensed Implementers	8. Portfolio Management (RIA) 9. Tax and Compliance Work (CPA) 10. Legal Document Execution (JD) 11. Risk Management (Insurance Professional)
Evaluators/Educators	12. Family Meetings and Education

Family Office Services
8105 Irvine Center Drive • Suite 780
Irvine, California 92618
Phone: 949.878.9400 • Fax: 949.878.9401
www.vfos.com

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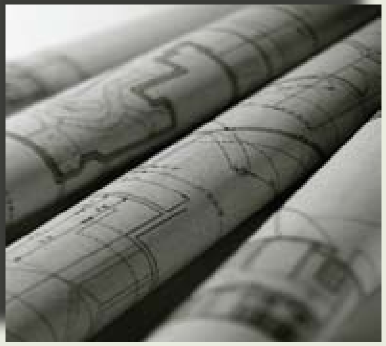
Simplify Your Life

Our Family Office Services Give You Freedom to Pursue Your Vision



WEALTH COUNSELING AND BLUEPRINTING

The Family Wealth Blueprint® unites your family leaders and your advisers around a shared vision with specific action steps. The Blueprint displays lifetime income statement and balance sheet numbers in a format that can easily change in response to changing goals, tax laws, cash flows, and/or asset values.

TAX AND BUSINESS PLANNING

We can help you take your business to the next level with wise counsel concerning day-to-day operations, tax-advantaged business strategies, business succession planning, or mergers and acquisitions.

RISK MANAGEMENT

Our staff supports your risk management professionals by analyzing, designing, and illustrating solutions to protect your hard-earned wealth.

ACCOUNTING SERVICES

Our team can collect and illustrate your accounting data while helping you produce accurate transaction blotters, financial statements, and tax returns.

ESTATE PLANNING AND ADMINISTRATION

We can help you create a tax-wise estate plan that will benefit you today and protect your heirs in the future.

PHILANTHROPIC SERVICES

Our team can help you realize your spiritual, civic, and legacy goals through planned giving and exempt organization representation.

INVESTMENTS

Your investment goals are unique. We coordinate with your investment advisers to fund your trusts with appropriate assets for achieving your lifetime income and wealth transfer objectives.

CONCIERGE SERVICES

Successful planning requires that a detail-oriented case coordinator keep track of "who will do what by when." We track detailed next action checklists with appropriate levels of secure web-access.