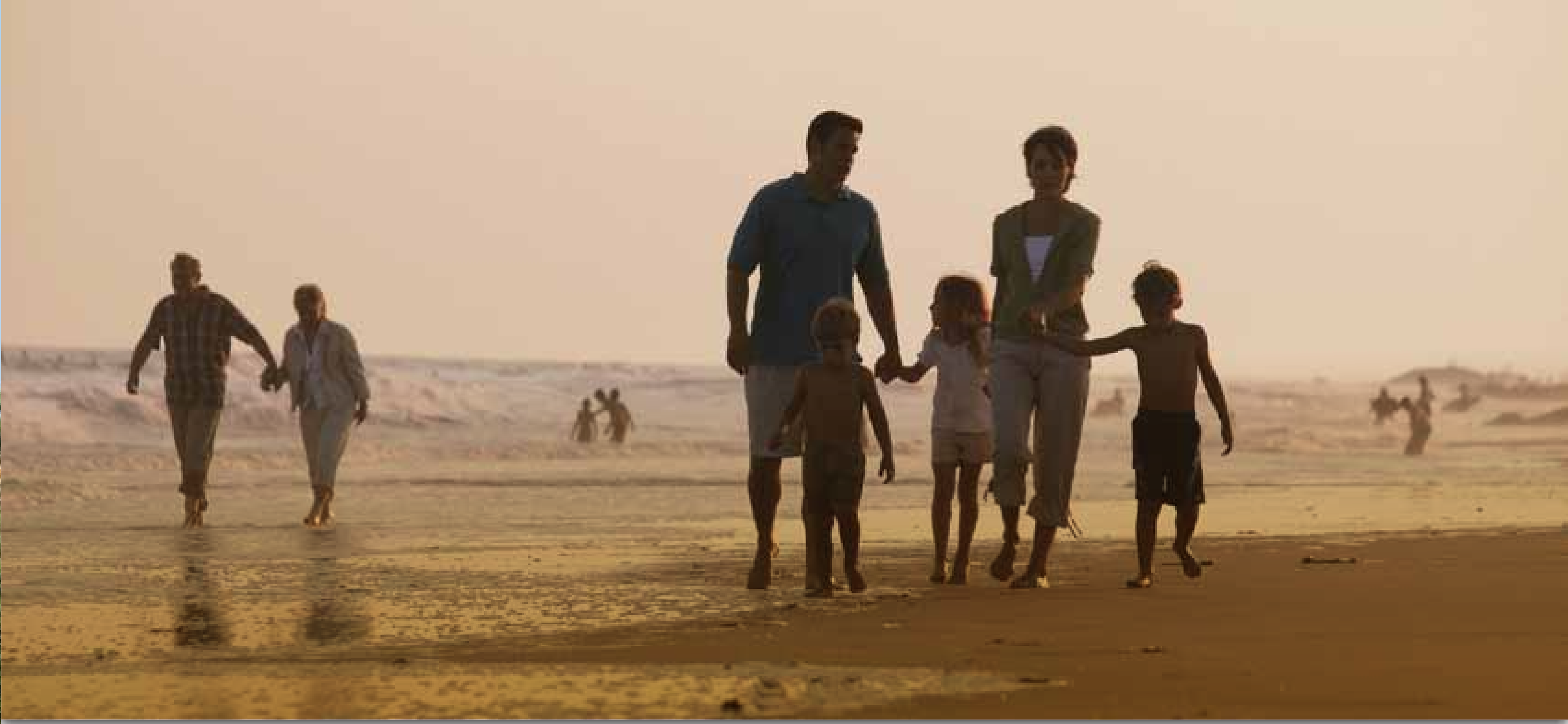
Preserving, Protecting And Transferring Your Legacy

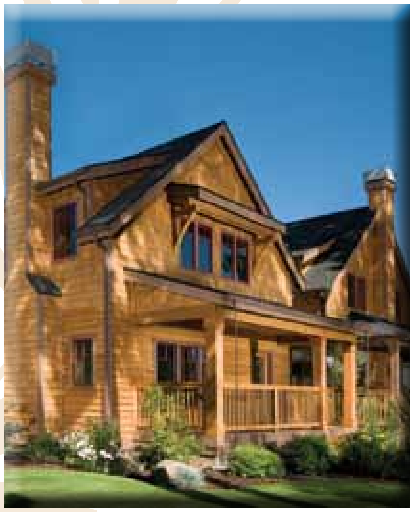
In furtherance of our stated commitment to exceed our clients' expectations, Matsen Voorees Law offers a thoroughly developed protection and maintenance program designed to ensure that your Estate Plan remains current. Your Estate Plan has been custom designed in order to achieve your specific goals, desires, and wishes. Proper Estate Planning is a process, not a one time event. We believe it is imperative that you keep your plan current and up-to-date, to continually preserve, protect and ensure the transfer of your legacy by active participation in the Estate Planning Protection Plan™.

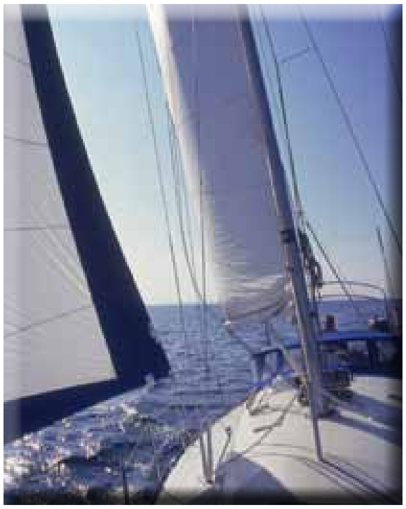


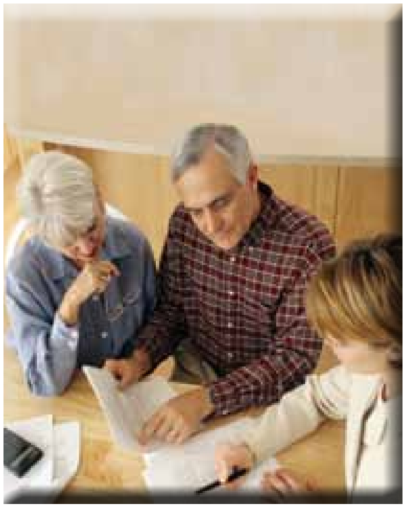
Change

CHANGE IS INEVITABLE, AND LIFE TENDS TO RUTHLESSLY PUNISH INACTION. THE FOLLOWING IS A GENERAL LIST OF LIFE CHANGES THAT COULD ALTER YOUR ESTATE PLAN OBJECTIVES AND CAUSE COMPLICATIONS FURTHER ON DOWN THE ROAD:

- Marriages or divorces
- Deaths
- Moving to another state
- Acquisition of property
- Births or adoptions
- Serious illnesses
- Substantial changes in the size of the estate
- Changes in business interest or retirement
- Changes with life insurance
- Changes in attitudes and/or behavior
- Financial irresponsibility
- Changes in tax law







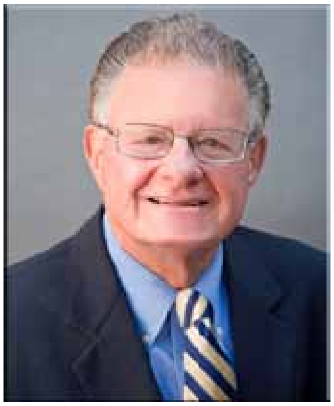
Matsen Voorhees' Exclusive Estate Planning Protection Plan™

Our Estate Planning Protection Plan™ is designed to address the critical points that impact your Estate Plan at an affordable price and on an annual basis. The collective experience of the entire estate planning team at Matsen Voorhees Law will ensure that your interests are protected and your decisions are sound. Some of the significant benefits you will receive with the Estate Planning Protection Plan are:

- Updates explaining changes in tax laws, IRS rulings and Estate Planning options
- An annual review of your Estate Plan to alert you to any required changes
- An annual review of the manner in which your assets are titled, to determine whether changes might be appropriate
- Workshops to educate you on specific Estate Planning issues
- Workshops for Successor Trustee training
- Basic Trust Amendments (i.e., Trustee and Beneficiary changes)
- Unlimited telephone consultations to answer your basic Estate Planning questions
- Personal consultations for advanced planning needs, as they may arise

We Would Be Most Pleased And Honored To Protect Your Estate Plan.

Principal Partners
Jeffrey R. Matsen and Timothy L. Voorhees



Jeffrey R. Matsen is one of the leading estate planning and business transactional attorneys in Southern California and throughout the United States. Since receiving his law degree with honors from the UCLA School of Law in 1967, Jeff has provided a wide range of clients with the highest level of legal services for over 45 years.

As a Principal Partner at Matsen Voorhees Law, Matsen is entirely commited to providing his clients with the quality, professionalism and integrity they deserve. His dedicated staff consists of excellent legal and financial experts stand who ready to assist in all areas of estate-planning.

Matsen is also well versed in all areas of asset protection law, and has recently published an excellent resource on the subject, *The Ladder of Success: An Asset Protection Planning Primer.* In addition, his knowledge of international law and close ties with respected attorneys, financial advisors and certified public accountants across the globe, make Matsen one of the most sought after attorneys in California.

Attorney Matsen's knowledge, professionalism, responsiveness and integrity have vaulted him to the top of his field, culminating in his designation by *Worth* magazine as one of "America's Top 100 Attorneys." The nationally renowned attorney rating service, 'AVVO' has rated Mr. Matsen a perfect "10/10 Superb." Perhaps most significantly, Matsen is the father of seven children and was honored as the Orange County "Father of the Year" in 2007. His family values combined with his expertise make him the best choice for your estate planning needs.

Timothy L. Voorhees has focused on zero tax planning for the last 35 years, becoming a nationally sought after speaker and adviser. Since earning his JD at Southern Methodist University with a concentration in Corporate & Estate Planning Law and an MBA at Arizona State University with a specialization in Finance & Accounting, Voorhees has helped thousands of clients integrate charitable and non-charitable tools to reduce taxes, increase lifetime income, enhance wealth transfers and augment charitable giving potential.

Voorhees is a principal partner of Matsen Voorhees Law, where he maintains a national practice in conjunction with locally licensed attorneys. Voorhees has led teams that have developed hundreds of Family Wealth Blueprints® for high net worth clients. Since 2003, Voorhees has also served as the president of the Registered Investment Advisory firm at Voorhees Family Office Services.

As an expert to the experts, Voorhees teaches Best Tools Workshops for advisers interested in learning how to integrate the most effective zero tax planning tools into financial and estate plans. He regularly speaks at national conferences and publishes in *Estate Planning Magazine*, *Journal of Practical Estate Planning*, and other leading publications. He has recently authored *The Best Zero Tax Planning Tools : How to Maximize Tax-Efficient Lifetime Income, Transfers to Heirs and Gifts to Favorite Charities*, an accessible and practical guide to getting the most out of your wealth for yourself, your family, and your favorite charities.

When not busy ensuring the success of other families' legacies, Mr. Voorhees enjoys spending time with his wife and their sons.

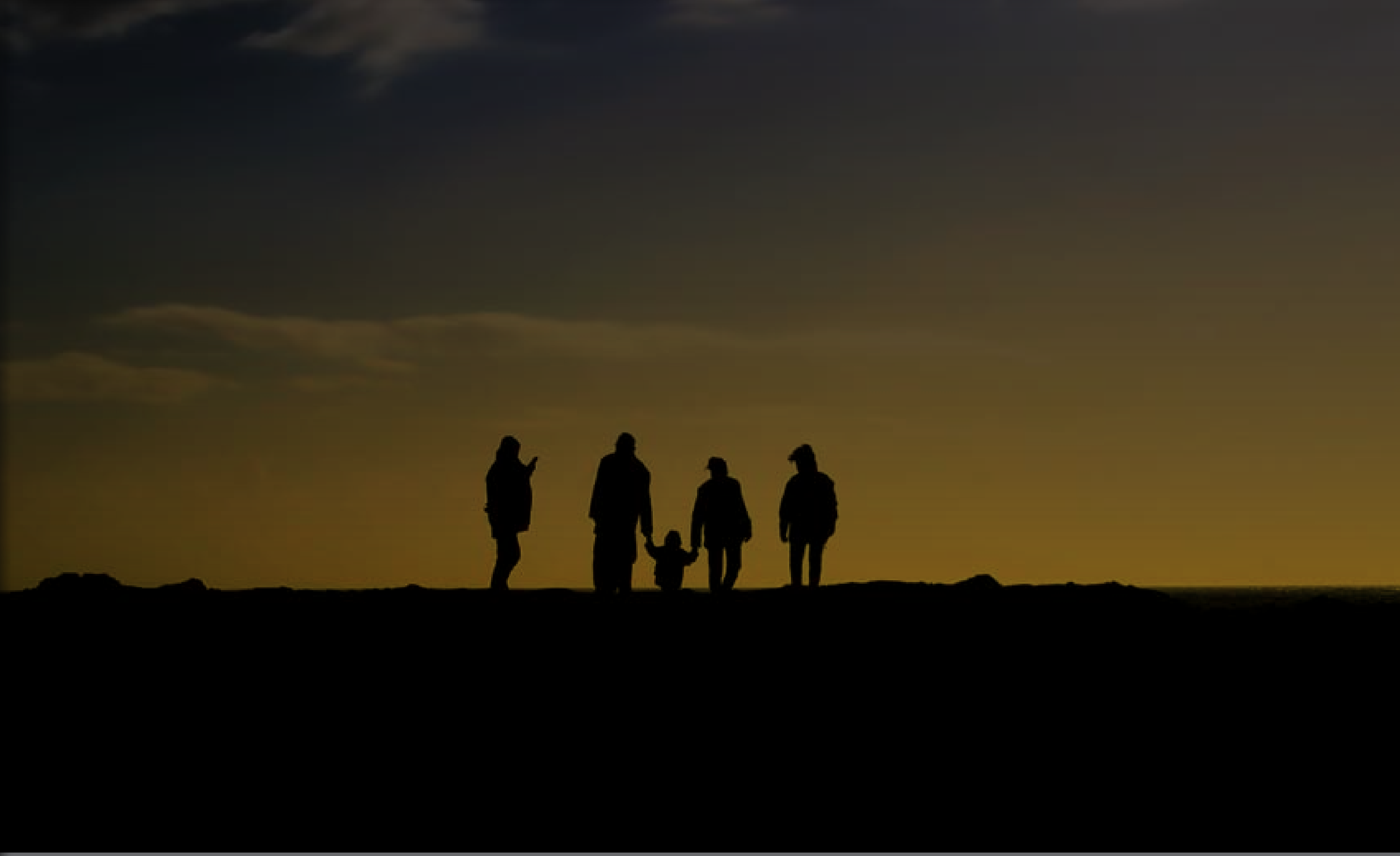
Matsen Voorhees Law

A DIVISION OF BOHM MATSEN, LLP

MV
LAW

Maximizing Value with Zero Tax and Asset Protection Planning

695 Town Center Drive
7th Floor
Costa Mesa, CA 92626
Phone: 800-447-7090
Fax: 866-447-7090
www.matsenvoorhees.com
info@matsenvoorhees.com



Exclusive Estate Planning Protection Plan™

Matsen Voorhees Law

A Division of Bohm Matsen, LLP