Results

Stop paying so much in taxes! We are credentialed attorneys, investment advisers, and wealth counselors with decades of experience and a proven track record of helping individuals and businesses maximize their wealth. Below are just a few examples of results from typical cases:

	Increased Income Tax Deductions	Increase To Heirs	Increase To Charity	Estate Tax Savings
Client 1	$ 322,080	$ 4,381,362	$ 6,887,378	$ 3,035,712
Client 2	$ 486,475	$ 119,623	$ 4,304,322	$ 2,931,200
Client 3	$ 530,902	$ 4,488,873	$ 13,718,933	$ 8,253,384
Client 4	$ 368,239	$ 1,337,351	$ 808,895	$ 2,119,857
Client 5	$ 940,577	$ 6,830,426	$ 13,340,482	$ 11,673,976
Client 6	$ 4,159,147	$ 7,381,307	$ 23,485,508	$ 27,335,629

OUR PLANNING PROCESS CAN HELP YOU:

Control 100% of Your Wealth – by employing strategies that:

- Eliminate estate and/or gift taxes.
- Reduce or eliminate income taxes.
- Protect assets from creditors.
- Pass the full value of an estate to family and charities.

Move from Success to Significance – through a planning process that aligns financial and legal plans with your vision for pursuing goals such as these:

- Making charitable gifts instead of paying taxes
- Involving family members in benefiting the community

Assemble a Highly-Skilled Planning Team – that enables you to:

- Engage nationally-respected attorneys through a simple process.
- Benefit from the depth of experience of advisers who specialize in unique strategies for wealthy families.
- Work with planners who understand the complexities of Multidisciplinary Planning.
- Obtain a full-color plan illustrating all of the proposed tools.
- Receive comprehensive client presentations that illustrate and integrate the effects of all proposed strategies on cash flow, taxes, charitable giving, and wealth distribution.
- View attractive and easy-to-follow graphs, tables, and text reports.
- Maintain financial and estate information in a format that can be updated easily during quarterly or annual reviews.

Your Next Step

During an initial consultation ("IC"), we will review your goals and existing plans to spot opportunities and offer solutions that generally cost less than 1% of the tax savings. Each IC is led by Tim Voorhees, Jeff Matsen, and/or an attorney trained by one of our partners on advanced planning techniques. For free information about our ICs, visit www.FreeIC.Info. To schedule time with an attorney to review the best techniques for minimizing taxes and funding your vision, please call us at (800) 447-7090 or email us at info@MatsenVoorhees.com.

As a principal partner at Matsen Voorhees and president of a registered investment advisory firm, Tim Voorhees has led teams that have developed hundreds of zero-tax plans to help clients realize their wealth transfer goals.

As one of the top estate planning attorneys in the country and a principal partner at Matsen Voorhees Law, Jeff Matsen has spent his 45-year career providing his clients with the highest level of legal service.

Our Mission: "To help our clients fund their visions tax efficiently by implementing plans for minimizing taxes and maximizing the value of their estates, their businesses, and transfers to their family members and favorite charities."

What Makes Us Unique:

1. Our team cares more about your vision and aspirations than your assets.
2. Our highly capable team has planned hundreds of cases using a proven planning process.
3. Our proprietary software integrates 300+ planning instruments in a plan optimized for you with detailed annual balance sheet and cash flow numbers through life expectancy.
4. We implement! We have a track record documenting how we have generated millions of dollars in benefits on hundreds of cases.
5. We provide a free discovery session and low-cost "Value Proposition Letter" to show you the benefits and costs of planning before you engage us for planning.

Matsen Voorhees Law

A DIVISION OF BOHM MATSEN, LLP

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Email: info@MatsenVoorhees.com

Fund Your Vision Tax Efficiently!℠

MV LAW

Matsen Voorhees Law

A DIVISION OF BOHM MATSEN, LLP

Your Vision

We work with you to reflect your vision in a carefully-crafted summary of spiritual, emotional, relational, and financial goals. We then develop a plan that integrates the optimal planning instruments to help you realize your vision and achieve the purpose for which you were put on this earth.

"As you move through the days and years of your life, you do not go unnoticed. You leave a trail, an impression, footprints…unquestionable proof that you existed…in the lives of those around you."

Lee Ann Womack:
Something Worth Leaving Behind

Legal services offered through Matsen Voorhees Law,
a division of Bohm Matsen, LLP

The Process

While Matsen Voorhees Law offers one of the most comprehensive arrays of services for wealthy families, the manner in which we help you use our services sets us apart. We have pioneered a proven process for uniting all of your advisers around your dreams, reviewing all aspects of your current plan, and guaranteeing you benefits far greater than costs. We combine any of 300+ planning tools and 200+ planning services to achieve any of the 100+ goals that you consider most important.

The Seven Levels of Service Provided By A Capable Planning Team

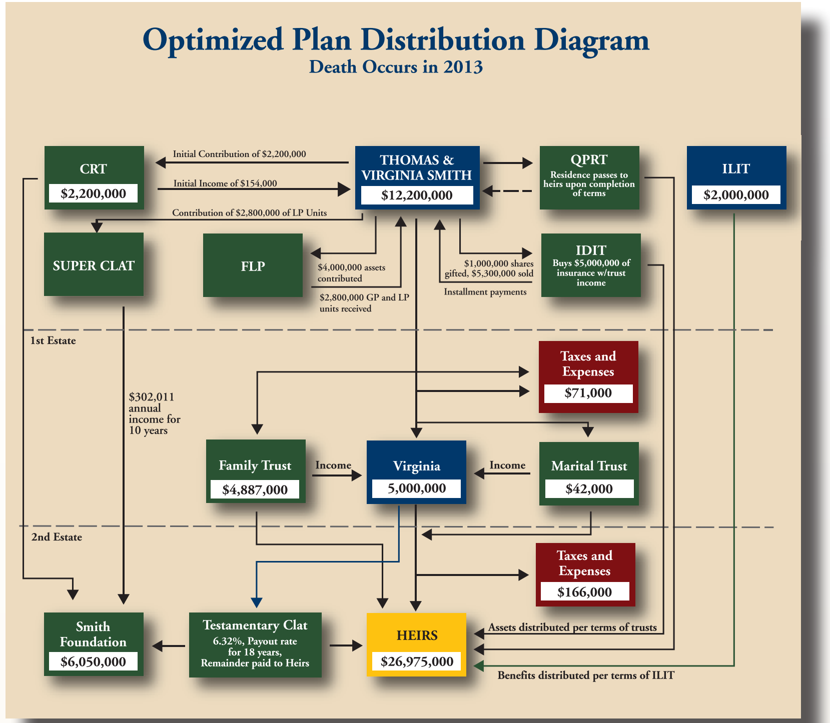
7 Levels	7 Roles	7 Deliverables
C	COUNSELOR	Family Wealth Statement
A	ANALYST	Financial Check-up and/or Value Proposition Letter
P	PLANNERS	Tactical Plan and/or Comprehensive Plan
A	ADVISER COORDINATOR	
B	BINDER/PUBLISHER	
L	LICENSED IMPLEMENTERS	Legal Documents
E	EVALUATOR/EDUCATOR	Annual Updates

Our process allows you to:

- Apply creative and cutting-edge ideas not widely available.
- Optimize both your portfolio and your estate plan to achieve true wealth optimization.
- Maintain financial and estate information in a format that keeps all of your advisers "on the same page."
- Integrate the impact of all proposed strategies on cash flow, income taxes, charitable giving, estate taxes, and wealth distribution.
- Reoptimize the plan in response to changing goals, asset values or tax laws with ease.
- Understand the integrated planning results in attractive and easy-to-follow graphs, tables, and text reports.

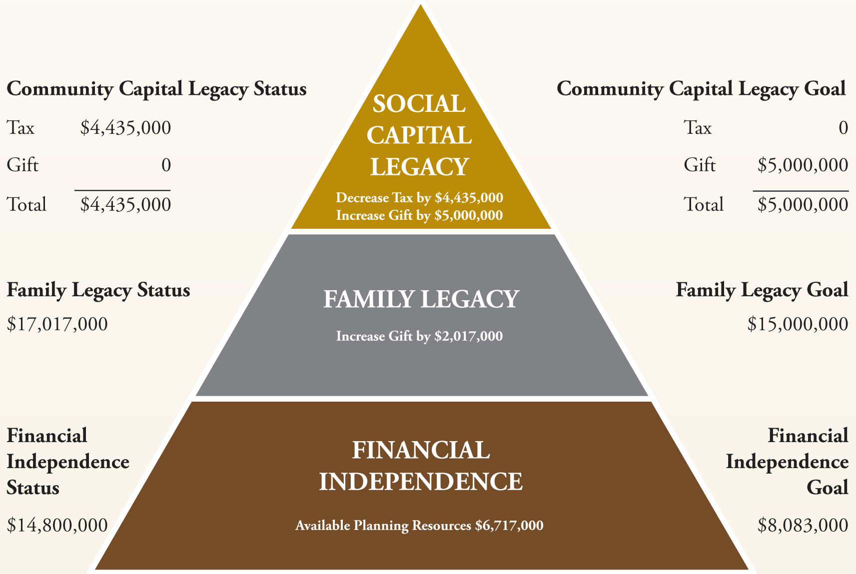
The Plan

We summarize all of your numbers with simple graphics, text, and tables. You can easily update the plan in response to changing goals, tax laws or assets. We provide both detailed and concise cash flow summaries.



No plan provides reliable projections unless you look at the cash flow and balance sheet numbers every year through life expectancy. We have generated compelling results on hundreds of implemented plans.

Financial Independence Triangle



The blueprinted benefits for family and favorite charities can be summarized on a pyramid showing wealth available for financial independence, family, and favorite charities