

# PEPNET

Pepperdine Estate Planning Network

## ZERO TAX PLANNING TOOLS FOR 2013 AND BEYOND

**Tim Voorhees, J.D., M.B.A., Matsen Voorhees Law**

South Chapter—Tuesday, May 7, 2013 (New Location)

North Chapter—Wednesday, May 8, 2013

### ZERO TAX PLANNING TOOLS FOR 2013 AND BEYOND

- Help business owners climb the tax-efficiency pyramid to take advantage of charitable alternatives to qualified plans and SERPs.
- Help clients avoid IRD taxes that can consume more than half of their IRA, annuity, and other investments.
- Generate tax-free income and create income tax deductions using intellectual property donations.
- Combine charitable tools with the 10 best income tax planning strategies of 2013.
- Integrate charitable and non-charitable tools to achieve objectives summarized in the downloadable materials at [www.ZeroTaxCounsel.com](http://www.ZeroTaxCounsel.com).

### Tim Voorhees, J.D., M.B.A.

Mr. Voorhees is the managing partner of Matsen Voorhees Law and president of Family Office Services. He is a national lecturer, trainer, and author. Mr. Voorhees has 34 years of experience providing wealth, estate, and charitable planning for multi-million dollar estates through national wealth planning organizations and financial service companies.

#### South Chapter (New Location)

12 noon–1:30 p.m.  
Center Club  
650 Town Center Drive,  
Garden Level  
Costa Mesa, CA 92626

#### North Chapter

12 noon–1:30 p.m.  
The Skirball Center  
2701 North Sepulveda  
Boulevard  
Los Angeles, CA 90049

#### Registration Due: May 2, 2013

\$0 for members and member guests  
\$85 for non-members

Our yearly \$250 membership option pays for three meetings (and parking expenses) for you and one guest.

**Thank you for supporting PEPNET!**

**RSVP by May 2, 2013**

\$0 for members and member's guest  
\$85 for non-members

Our yearly \$250 membership option pays  
for three meetings (and parking expenses)  
for you and one guest.

**RSVP To: Paul Martello**

Tel: 310.506.7731

Fax: 310.506.4859

E-mail: paul.martello@pepperdine.edu

## REGISTRATION AND PAYMENT

ONLINE CREDIT CARD REGISTRATION: [www.pepperdine.edu/PEPNET](http://www.pepperdine.edu/PEPNET)

Checks payable to: *Pepperdine University*

Name \_\_\_\_\_

Company \_\_\_\_\_

Guest (Included with new membership) \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

\_\_\_ 1-year PEPNET membership @ \$250    \_\_\_ Non-member(s) @ \$85

\_\_\_ **South Chapter, Tuesday, May 7, 2013**

\_\_\_ **North Chapter, Wednesday, May 8, 2013**



## WHAT IS PEPNET?

PEPNET is a mutual-benefit society sponsored by Pepperdine University for estate planning professionals. This professional organization was created in 1998 by the Center for Estate and Gift Planning to provide quality education for professionals in the estate planning arena and to facilitate a productive and mutually rewarding relationship with its members.

### MEETINGS

Members meet three times annually at convenient locations to strengthen their relationships, to network with other professionals, and to participate in continuing education seminars.

### MEMBERSHIP

Membership is open to all professions who serve in the estate planning field, but primarily comprises attorneys, accountants, financial planners and consultants, trust officers, and life insurance professionals.

### MEMBERSHIP INCLUDES

- ▶ Continuing education credit.
- ▶ Listed in the PEPNET directory in print and on the Web.
- ▶ Access to the PEPNET page on LinkedIn.
- ▶ Weekly e-newsletter with relevant estate planning topics.
- ▶ Ability to network with top estate planning professionals.
- ▶ Parking at PEPNET meetings.
- ▶ Special invitations and priority seating with concierge service at Pepperdine events.

### CENTER FOR ESTATE AND GIFT PLANNING

Contact: Paul Martello

24255 Pacific Coast Highway  
Malibu, CA 90263-4859

Tel: 310.506.7731 • Fax: 310.506.4859

[paul.martello@pepperdine.edu](mailto:paul.martello@pepperdine.edu)  
[www.pepperdine.edu/pepnet](http://www.pepperdine.edu/pepnet)