California Forum 2007 Goes Thriving

Thriving in Estate and Business Planning – Before and After the Tax Reform

1 1/2 Days to Learn a Unique, Proven Client and Referral Driven Process that will bring Your Practice to the Next Level

As you know, during these confusing and difficult times it is even more important that we gather together to share insights, education and collegiality. The Southern California Institute is very excited and proud to announce that we, along with our colleagues at WealthCounsel LLC, will be collaborating together to bring the **California Forum Goes Thriving** program to San Diego on July 20th and 21st, 2007.

Do you want to build a thriving professional practice? In just 1-1/2 days of CLE-qualified training, you'll discover the techniques and strategies for doing just that. This program is open to everyone, not just WealthCounsel members. Learn from the real-world experiences of WealthCounsel and WealthCounsel Advisors Forum members who have created and sustained profitable practices by working together effectively, despite ever-changing tax laws and challenging marketplaces.

The Thriving program is the most progressive CLE/CPE/CFP-approved course we've designed to teach attorneys, accountants, bankers, financial advisors, and other professionals how to create teams that provide clients with attractive solutions, atypical strategies, and optimum service. The processes and solutions we teach in the fast-paced program will empower you to attract more opportunities, close more business, make more money, and ultimately serve your clients with a new level of confidence and competency. This program will help you strengthen relationships with your team members and help everyone build a thriving professional practice.

Keynote Speakers:
M. Todd Petersen, CFP®, MBA
Carl Waldman, Esq.

Moderator:
Joseph Strazzeri, Esq.

Dates:
Friday, July 20 & Saturday, July 21, 2007
Friday: 8:30a.m. – 5:00p.m.
Saturday: 8:30a.m. – 1:00p.m.

Participant Fee:
$325.00

Program Location and Accommodations:
Sheraton San Diego Hotel & Marina
1380 Harbor Island Drive
San Diego, CA 92101
Reservations: 619-291-2900
WealthCounsel Group Rate: $199.00

To Attend:
Please contact Anita at anita.trudeau@wealthcounsel.com, phone at (888) 659-4069 ext. 813, or register directly at www.wealthcounsel.com/thriving.aspx

For more event information please visit
www.scinstitute.org or www.wealthcounsel.com

Southern California SCInstitute

WealthCounsel, LLC
Knowledge & Tools for The Estate Planning Community

California Forum 2007 Goes Thriving

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Friday, July 20, 2007

Building a Profitable and Sustainable Foundation

8:30 – 8:45 **WealthCounsel and WealthCounsel Advisors Forum & You**

8:45– 9:15 **What's Changing – What's Not**
What's changing in estate planning and financial services and how it presents us with opportunities.

9:15 – 10:00 **Deal Making vs. Deal Breaking** - *A Process to Reframe Your Referral Network and Your Approach to Prospective Clients*
First, we'll explore how attorneys and advisors can work successfully together to build indispensable partnerships, producing measurable economic benefit while providing the best possible planning for their clients. Then, we'll discuss how to help clients identify risks that cause their greatest concern and worry. The key here is helping clients decide which risks are most critical to them so that they are motivated to engage your team to create and implement the legal and financial solutions.

10:00 – 10:15 **Break**

10:15 – 10:45 **A Process to Reframe Your Approach to Prospective Clients**
How we can remake our image from gloomy death planners to expert problem solvers. Our process will show you how to help clients identify risks that cause their greatest concern and worry. Several examples will be illustrated, but the key is helping clients decide which risks are most critical to them so they are motivated to work with you on the solutions.

10:45 – Noon **Expanding Your Solutions Set and Enhancing Revenues**
We will present a number of strategies that are just a bit beyond the basic "Wills & Trust" planning. Solutions for additional fees that you can use for clients not likely to meet the estate-tax threshold and beyond the foundational Revocable Living Trust. Many of these strategies will work just as well and generate additional planning for your advanced clients, too. We'll include:

1. IRA Annuitization
2. Inheritor's Trusts
3. Stand Alone Retirement Accumulation Trust
4. Stand Alone Education/Retirement Trust
5. Retirement ILIT
6. Revocable Gift Trust
7. Survivorship Life Policy within ILIT as Investment
8. Domestic Self-Settled Asset Protection Trusts
9. Inter Vivos Bypass Trust – "Family Bank Trust"
10. Intentionally Defective Grantor Trust for Tax Burning
11. Income Shifting with Family Entities
12. Young Person's Trust – UTMA/UGMA Bailout Strategy
13. Alaska Community Property Trust
14. Stay Bonus for Business Owners

Noon – 1:00 **Lunch Discussion – WealthCounsel Advisors Forum**
Overview of member benefits and tools that teach and support all members of the team with a demonstration of the Wealth Strategies Inventory - a practical, easy-to-use client design system.

1:00 – 3:15 **Expanding Your Solution Set**
A continuation of the strategies listed before lunch, as well as the beginning of collaborative interplay through case study introduction and design.

3:15 – 3:30 **Break**

3:30 – 4:45 **California Legislative Updates**
Vito Lanuti, Esq. & Susan Katzen, Esq.
Vito and Susan will work through California law affecting products and strategies offered under the Thriving Model. This interesting and relevant presentation will help you stay current and safe by understanding your rights and obligations while serving your clients.

5:00 - 7:00 **Thriving Reception**
Use this opportunity to join your colleagues for refreshments and company at this networking reception.

Saturday, July 21, 2007

Putting It Into Practice – Collaboration

8:30 – 10:30 **Expanding Your Solutions Set (Collaboration & Case Study)**
Work with fellow students as interdisciplinary collaborative teams to develop real life answers to expand your solutions set. Present and critique varying answers using techniques you already know, along with the ones you have just learned.

10:30 – 10:45 **Break**

10:45 – 1:00 **Technical Applications and Language Choices as Illustrated through WealthDocs**
Matt McClintock, Esq.
Refine your understanding of the Thriving Concepts as it relates to client-specific situations, as demonstrated through WealthDocs. Learn the nuances and modifications to tools you already have to leverage interdisciplinary techniques. Utilize this last session to put it all together to bring home to your practice.