



REGISTRATION

Pre-Registration is Necessary.

- Online registration is available at our web-site at <http://assetprotectionsociety.org/advisors/?a=PG:906>
- You may also register by calling 312-212-3651
- Dates of the Seminar: October 1-2, 2007



FOR HOTEL RESERVATIONS

The seminar will be held at the Monte Carlo Hotel in Las Vegas, Nevada

- You can make online reservations by calling 888-529-4828
- Ask for the group rate titled The Asset Protection Society



Plan to Arrive Sunday

- The seminar will start promptly at 8:00am on Monday morning and arriving Sunday will assure you will not miss the opening session



Consultations

- Private meetings will be available for advisors and/or non-advisors. If you would like to meet with one of the speakers before, during or after the seminar, please make arrangements ahead of time by e-mailing info@assetprotectionsociety.org or calling 312-212-3651



THE FIRST ANNUAL

ASSET PROTECTION FORUM

Presented by:

The Asset Protection Society

www.assetprotectionsociety.org





THE FIRST ANNUAL ASSET PROTECTION FORUM

October 1st & 2nd ~ Las Vegas, NV

BENEFITS :

- Learn cutting edge/advanced planning techniques
- Learn asset protection scams to stay away from
- Listen to national experts speak on their area of specialty
- Learn from real world examples through a round table discussion by the speakers
- Learn how to grow your business through "global" asset protection
- Be able to meet with the speakers one on one

CALENDAR :

SUNDAY SEPT 30	MONDAY OCT 1	TUESDAY OCT 2
Arrive in Las Vegas and check into Hotel	Day One 8am - Noon Seminars Noon-1pm Lunch 1pm-5pm Seminars	Day Two 8am - Noon Seminars Noon-1pm Lunch 1pm-5pm Seminars



"The best estate, financial or tax plan can be rendered meaningless by a creditor if asset protection has not been incorporated into the plan. Attend to the APS™ Forum in Las Vegas and learn "Global" asset protection so you can protect your assets or that of your clients."

Rocco DeFrancesco, JD, CWPP™, CAPP™, MMB™
Co-Founder: The Asset Protection Society

FEATURED SPEAKERS & TOPICS :

Jim Duggan, JD, MBA

Domestic Asset Protection Strategies & Captive Insurance Companies ("CIC"s)

Robert Lambert, JD

Kinetic Asset Protection (integrating onshore and offshore asset protection)

Jarrett Bostwick, JD, LL.M.

International Tax Planning with Life Insurance and Annuities & Cutting Edge Estate/Financial Planning Techniques

Jeffrey R. Laterbach

A New Kind of Trust Company

Randall Edwards, JD

Asset Protection Strategies to Avoid

Rocco DeFrancesco, JD, CWPP™, CAPP™, MMB™

Co-Founder: The Asset Protection Society

Equity Harvesting (The proper use of Missed Fortune 101) & Market Your Practice Using Asset Protection Planning and the C.A.L.M. Plan

John Lalonde

Proper and Cutting Edge uses of 419 Plans and VEBAs

Bruce Haydu

Premium Financed Life Insurance (A client-friendly program)

Tim Berry, JD - The Tax Academy

Advanced IRA Planning Techniques

8:00 - 8:30 am

Introduction to The Asset Protection Society and Two-Day Forum

The APS™ Founders

8:30 - 10:00am

Domestic Asset Protection Strategies

Jim Duggan, JD, MBA

Learn the foundation for how to setup and properly structure a “domestic” asset protection plan. Every client who implements an asset protection plan will have a domestic element to that plan. In this session, you will learn the proper use of domestic asset protection trusts, Limited Liability Companies, Family Limited Partnerships, dynasty trusts, and more. This session will also detail what assets are and are not protected (such as IRAs, life insurance, annuities, real estate etc). When you are done with this session, you should have a good working knowledge of core domestic asset protection planning and how to properly structure a plan.

10:00 - 11:00am

Kinetic Asset Protection (integrating onshore and offshore asset protection)

Robert Lambert, JD

Learn how to properly setup an offshore asset protection plan and why offshore planning is the most powerful way to protect a client's assets from creditors. You will also learn kinetic asset protection and how to integrate offshore protection with domestic planning.

While many advisors are intrigued by offshore asset protection planning, few have enough knowledge to talk about offshore planning with clients and their other advisors. By learning offshore planning you will be able to approach clients with significant wealth with the confidence that you have the knowledge to help them protect their assets. This session will explain how to setup an Offshore Asset Protect Trust and how the structure can be integrated seamlessly into a client's estate and financial plan. Finally, you will learn “kinetic” asset protection and how to integrate a domestic asset protection plan with an offshore plan.

11:00am - Noon

International Tax Planning with Life Insurance and Annuities

Jarrett Bostwick, JD, LLM

Learn how using international planning coupled with life insurance and annuities can save your clients significant amounts of income, capital gains and dividend taxes. This material will explain, among other concepts, how a client can use profitable closely held or publicly held stocks as in-kind premium payments for a life insurance policy where, once owned by the policy, the profits are not income taxed (and where the client will have access to the cash via policy loans).

Noon - 1:00pm

Lunch

1:00 - 2:00 pm

Cutting Edge Estate/Financial Planning Techniques

Jarrett Bostwick, JD, LLM

Learn how to help your clients “Super-Charge” their estate and financial plans by combining CRTs, CLTs, and FLPs, with financial products in innovative structures.

This session will look at how traditional tools used in the advanced planning arena can be rethought and reconfigured to produce extraordinary results. By combining the right structure with the right economic tools, clients can create a “perfect storm” of positive results to shift assets from one generation to the next in a smooth, tax-efficient manner, while at the same time protecting their assets from creditor claims.

2:00 - 3:00pm

A New Kind of Trust Company

Jeffrey R. Laterbach

Advisors and clients alike get frustrated with trust companies and their typical way of doing business. To many, that way of business seems far too trust-company focused and not very client focused. During this presentation you will learn about a new type of trust company that is based on a client-first approach where the trust company works in conjunction (vs. in competition) with a client's local advisor(s) to help clients protect and grow their wealth. You will learn how you can use trust company services not only to help your current clients, but also as a tool to grow your business in the affluent client market.

3:00 - 4:00pm

Asset Protection Strategies to Avoid

Randall Edwards, JD

My presentation will help the financial and asset protection advisor to be able to spot a bad asset protection plan, counter misconceptions that dishonest promoters push (and clients often fall for), and explain how the ethical and well-informed asset protection specialist may be the last – if not only – bastion against a client losing his shirt to some scam – or getting the client's name at the top of the audit list. Using a common-sense approach, the well-prepared advisor must evaluate any asset protection plan from the standpoint of “how will this stand up in court” as opposed to “how good does this look on paper?” This session will help you to understand, apply, and teach the “smell test” for any financial, estate, or asset protection plan.

4:00 - 5:00pm

New Developments in Domestic Life Insurance and Annuities

This hour of the forum will focus on using domestic cash value life insurance and annuities to protect and grow a client's wealth. The focus of this topic will be on the new products available in the marketplace with a specific focus on indexed products. Learning exactly how variable loan features work, different crediting methods (including the 140% method), what happens when you dramatically drop the death benefit, and more will be discussed.

8:00 - 9:00am : Equity Harvesting (The proper use of Missed Fortune 101)

Roccy DeFrancesco, JD, CWPP™, CAPP™, MMB™

Co-Founder: The Asset Protection Society

If you've read Missed Fortune 101, you are only getting half the story. Learn how to implement an Equity Harvesting strategy the "right" way so your clients can build their wealth in a tax-favorable manner using their home's equity and in a manner so clients do not feel the pain of the adverse tax consequences of an improperly constructed plan. Equity Harvesting is all the rage these days. Thousands of advisors are touting books like Missed Fortune 101 and Stop Sitting On Your Assets to clients and counseling them to leverage their homes to fund cash value life insurance in an effort to build a larger retirement nest egg. While the concept of Equity Harvesting can be a good one, you'll want to attend this session so you can learn the faults of these books and so you can learn how to implement an Equity Harvesting plan that complies with the Internal Revenue Code. Equity Harvesting can be a powerful tool, but misused (as it is by many) can have catastrophic consequences for clients and their advisors.

9:00 - 10:00am : Proper and Cutting Edge uses of 419 Plans and VEBA's

John Lalonde

Learn how 419/VEBA plans can help your business clients reduce their income taxes, purchase life insurance that will pass income and estate tax-free to the beneficiaries, and allow for tax-deductible funding for tax-free post-retirement medical benefits all in a plan where the assets are protected from creditors. You will also learn about the new annuity-only VEBA and the pitfalls of this topic when you use a vendor that is not compliant. One of the most powerful tools for any small business owner is 419/VEBA plan. No where else can a client take a deduction to purchase life insurance for an estate plan where the death benefit will pass income and estate tax-free if setup properly. No where else can a client take a deduction to pay for medical expenses in retirement (that all clients will have) where the income from the plan is tax-free when used for qualifying medical benefits. Finally, what will really make this session unique is the discussion about an annuity-only VEBA for clients who are only interested in funding for post-retirement medical benefits.

10:00 - 11:00am : Premium Financed Life Insurance (a client-friendly program)

Bruce Haydu

Learn how premium financed works to help wealthy clients leverage their assets efficiently to purchase the needed death benefit for estate planning. You will also learn about the only client-friendly program in the industry which does not require a client to make interest payments, has an exit strategy besides death, and will take real estate as 100% of the collateral. Premium financed life insurance has been around for years. Few truly understand the mechanics and because of that, many advisors shy away from introducing it to their clients. Many affluent clients are asset rich (real estate) and cash poor. You will learn about a program that takes real estate as 100% of the collateral. Additionally, most programs require the client to make interest payments on the loan at some point and the only exit strategy (to remove the lender) is death. You will learn how to structure a premium financed case so that no interest should be due on the loan and where the target time frame to remove the lender is 12-15 years. This is truly the only client focused program in the industry and you won't want to miss this session

11:00 - noon : Captive Insurance Companies ("CIC"s)

Jim Duggan, JD, MBA

Learn how CICs can be used to help clients reduce their annual insurance expenses, reduce their income taxes by literally hundreds of thousands of dollars a year, and reduce their ultimate estate taxes by millions of dollars. If you have heard of CICs but never had an opportunity to learn how powerful and useful they can be, you will not want to miss this session. The laws have changed dramatically with CICs in the recent years and you will learn how CICs can be used under the current laws as one of the most powerful income and estate-tax planning tools at your client's disposal. You will also learn how, through the use of a simple insurance and LLC structure, owners of a CIC can access cash from the CIC income tax-free in retirement.

Noon - 1pm : Lunch

1:00 - 2:30pm : Advanced IRA Planning Techniques

Tim Berry, JD - The Tax Academy

This session will teach you cutting edge techniques clients can use in self-directed IRAs to grow their wealth and mitigate taxes upon distribution. This session will help grow your practices and avoid the mistakes advisors make when giving IRA advice to clients. While most professional planners believe they know the ins and outs of IRAs, most do not really understand how to correctly setup and operate a self-directed IRA. In fact, due to a lack of knowledge, most planners have caused disastrous tax consequences to their client's retirement portfolio. During this presentation, you will learn a number of different strategies on how your client can gain massive leverage with their IRA assets so as to build up wealth, as well as estate planning examples that can dramatically slash taxes on IRA distributions. In short, you will walk away with a number of concrete ideas that should allow you to gather millions in assets with your new found knowledge.

2:30 - 3:45pm : Case Studies

It's one thing to come to an advance planning forum where you sit and listen to some of the nation's top experts discuss interesting and useful topics to protect and grow wealth. It's another to have the experts walk you through real world case studies of how you can apply the topics learned at the seminar in the "real world." In this session, the speakers will go over multiple case studies and will allow the attendees to ask questions in an open-forum setting.

3:45 - 4:45pm : Market Your Practice

Using Asset Protection Planning and the C.A.L.M. Plan

Roccy DeFrancesco, JD, CWPP™, CAPP™, MMB™

Learn why asset protection planning is the best and easiest way to grow your practice. In this session you will learn how to systematically work with your clients to help them move from being totally unprotected from creditors to as safe from creditors as the best experts in the country can make them. Asset protection planning does not push products or solutions onto clients who are tired of being pitched by salespeople trying to get their business. Asset protection planning is about solving the most important problem clients with wealth have but do not know about. While it is important to know the subject matter, it is equally important for you to be able to communicate what you know to your clients and have a platform you can work off of to systematically work with your clients. In this session you will learn how to use the Comprehensive Asset Liability Management (C.A.L.M.) program to communicate the importance of asset protection to them and create for them a road map for how to become asset protected.

4:45 - 5:00pm : Concluding Remarks