

SPEAKER MEDIA KIT



ABOUT JEFFREY M. VERDON, ESQ.

Jeffrey M. Verdon, Esq. has been helping high-net-worth clients achieve their estate, taxation, and asset protection planning goals for 30 years, and is internationally recognized as an expert in his field. For over 20 years, Mr. Verdon has been presenting on various estate and taxation planning topics to public and private groups around the world.

Mr. Verdon has been practicing law in the areas of taxation and asset protection since receiving his Masters of Law (LL.M. Taxation) from Boston University in 1979. In addition to his numerous professional affiliations, he enjoys professional relationships with many of the most highly regarded taxation and asset protection lawyers in the United States and abroad.

Mr. Verdon is a Fellow and Senator of the distinguished Isle of Man-based *Offshore Institute*, a professional body that is dedicated to the education and training of competent practitioners in offshore and international finance and tax planning, and to improving the professional standards of those who dispense professional advice in this field. He is also one of the founding members of the editorial board of one of the earliest and most distinguished publications on asset protection planning, *Jacob's Report on Asset Protection Strategies*.

Jeffrey M. Verdon, Esq.

ABOUT JEFFREY M. VERDON, ESQ., CONT'D.

Mr. Verdon is the Managing Partner of Jeffrey M. Verdon Law Group, LLP, an estate and trust law firm located in Irvine, California, and Las Vegas, Nevada, which enjoys the highest rating (“AV”) given by the nationally-recognized independent law firm rating service of Martindale-Hubbell. Of the hundreds of high-net-worth clients for whom the firm has implemented advanced estate planning with asset protection strategies, the firm is proud of having created hundreds of millions of dollars in estate tax savings and an unblemished record of never having had a client's structure fail to provide the lawsuit protections for which it was designed.

Biographical Profile

Born in Miami, Florida, July 24, 1954; admitted to bar, 1978, California*

Education: Woodland University (B.S.L. 1974; J.D. 1977); Boston University (LL.M., Taxation 1979)

*At the age of 21, Mr. Verdon was the youngest law school graduate to pass the California Bar Exam in the state's history.

Publications

“**New Changes in Year-End Tax Legislation**” (Jeffrey M. Verdon Law Group, LLP Client Alert August 5, 2011)

“**The HIRE Act and the Law of Unintended Consequences**” (Jeffrey M. Verdon Law Group, LLP Client Alert July 27, 2011)

“**The Big Debate – Public Unions: Good or Bad for America?**” (Jeffrey M. Verdon Law Group, LLP Client Alert July 27, 2011)

“**Public Unions on Trial**” (Jeffrey M. Verdon Law Group, LLP Client Alert July 8, 2011)

“**Switzerland Adopts OECD**” (Jeffrey M. Verdon Law Group, LLP Client Alert July 7, 2011)

“**Nevada Law Amendment Enhances Creditor Protection for Nevada LLCs and Corporations**” (Jeffrey M. Verdon Law Group, LLP Client Alert June 24, 2011)

“**Have You Heard About Our HYCET TrustSM?**” (Jeffrey M. Verdon Law Group, LLP Client Alert, June 16, 2011)

Jeffrey M. Verdon, Esq.

“Advice from an Israeli Agent” (Jeffrey M. Verdon Law Group, LLP Client Alert, April 12, 2011)

“The Use of Captive Property and Casualty Insurance Companies for Asset Protection”
(Jeffrey M. Verdon Law Group, LLP Client Alert, February 12, 2011)

“California Residents Beware: New Social Host Liability Law for Furnishing Alcohol to Minors” (Jeffrey M. Verdon Law Group, LLP Client Alert, February 11, 2011)

“Estate Planning for Women Only (Revised for New 2010 Tax Law)” (2011)

“New Tax Law Creates Opportunity to Recover All of the Year 2008 and 2009 Real Estate and Investment Losses” (Jeffrey M. Verdon Law Group, LLP Client Alert, January 16, 2011)

“Paying Estate Tax May Now Be Voluntary” (Jeffrey M. Verdon Law Group, LLP Client Alert, January 11, 2011)

“2010 Tax Act – Year End Transfer Tax Planning Alert” (Jeffrey M. Verdon Law Group, LLP Client Alert, December 23, 2010)

“The New Estate Tax Law – A Tax Savings Opportunity You Should Know About and Must Complete Before December 31, 2010” (Jeffrey M. Verdon Law Group, LLP Client Alert, December 22, 2010)

“New HIRE Act Affects Those with Foreign Asset Protection Trusts” (Jeffrey M. Verdon Law Group, LLP Client Alert, November 10, 2010)

“Asset Protection Planning – The Conversion of the 401(k) Roth Account Under the New Law” (Jeffrey M. Verdon Law Group, LLP Client Alert, October 13, 2010)

“David McNair P.C. – Asset Protection Trust Audit” (Jeffrey M. Verdon Law Group, LLP Client Alert, August 5, 2010)

“Conversion of Traditional IRA to Roth IRA – How to Deal with Income Tax Consequences”
(Jeffrey M. Verdon Law Group, LLP Client Alert, July 26, 2010)

“Asset Protection Trusts & The Attorney Client Privilege” (Jeffrey M. Verdon Law Group, LLP Client Alert, June 24, 2010)

Jeffrey M. Verdon, Esq.

“The Jamie Solow Case: Counsel Discusses ‘What Really Happened’ ” (Jeffrey M. Verdon Law Group, LLP Client Alert, May 3, 2010)

“Your Estate Plan: Could This Happen To You?” (Jeffrey M. Verdon Law Group, LLP Client Alert, December 18, 2009)

“Mortgage Over Basis Problems? Not Anymore...How to Deal With Phantom Income” (Jeffrey M. Verdon Law Group, LLP Client Alert, December 15, 2009)

“Offshore Asset Protection Alert: Lessons Learned from the Case of Michael R. Mastro” (Jeffrey M. Verdon Law Group, LLP Client Alert, October 9, 2009)

“Is Your LLC a Ticking Time Bomb?” (Jeffrey M. Verdon Law Group, LLP Client Alert, October 1, 2009)

“Insurance Implications of Transferring Real Property to a Trust, Partnership, or LLC” (Jeffrey M. Verdon Law Group, LLP Client Alert, May 20, 2009)

“Protecting Assets and Lifestyle – Why ‘Going Offshore’ May Be the Best Option” (Jeffrey M. Verdon Law Group, LLP Client Alert, April 7, 2009)

“American Recovery and Reinvestment Act of 2009” (Jeffrey M. Verdon Law Group, LLP Client Alert, March 9, 2009)

"S Corporations - A Wolf in Sheep's Clothing - S Corporations v. Family Partnerships - The Proper Way to Own Your Mobile Home Park", WMA Reporter, March, 1990

"Why You Should Consider Asset Protection." Sonoma County Physician, Vol. 41, No. 1, Jan/Feb., 1990

"How You Can Insulate Your Assets from Liability Lawsuits and Unintended Creditors," (1989)

"Asset Protection & You" (1993) Chapter on International Trusts

BNA Tax Portfolio - Asset Protection Chapter on Community Property

Instructor

Business Law, Brooks College, 1977-1978

Fellow and Senator, Isle of Man-based Offshore Institute

CEB "Asset Protection Planning", panelist 1995-1996

Jeffrey M. Verdon, Esq.

ABOUT JEFFREY M. VERDON, LAW GROUP, LLP

Jeffrey M. Verdon Law Group, LLP, a boutique estate and trust law firm located in Irvine, California, is nationally-recognized for providing legal and tax planning services in the areas of advanced estate planning, income tax-efficient portfolio management, as

well as asset and lifestyle protection strategies to wealthy individuals and their families. For over 25 years, the firm has been working with a select number of high-net-worth families across the United States to help them achieve their estate, taxation, and asset protection planning goals.

As Seen In

Forbes®

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2008 SELECTIONS

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805-966-1501 | www.mullenlaw.com
For over fifty years, Mullen & Henzell, LLP has provided a sophisticated trusts and estates practice in a small town setting, with the expertise and depth of experience more often found in large metropolitan areas.

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For over 30 years, Jeffrey M. Verdon Law Group has provided high-net worth individuals with customized solutions for their asset & life-style protection needs, always integrating the highest level of income tax & estate planning.

**Clare H. Springs
Springs & Associates**
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Clare H. Springs, of the Offices of Springs & Associates, has a practice that emphasizes strategic wealth planning, estate planning, taxation and related areas of practice.

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Dill Weintraub, a senior partner of Jeffer Mangels with over thirty years of experience, combines expertise in both estate planning and business and tax planning.

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Ramsbacher Prokey LLP focuses its practice on representing high net worth individuals and family businesses in Wealth Planning which includes Tax and Estate Planning as well as Tax Controversy and Litigation against the IRS.

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Focusing on estate planning for both the simple estate and the high net worth individual with a more complex estate, including wealth planning, tax planning and related issues.

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Brown and Streza LLP focuses exclusively on complex income tax planning, estate planning, charitable gift planning, business operation planning and business succession planning.

**Jackoway Tyerman Wertheimer
Austen Mandelbaum Morris & Klein**
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For many years, Michele Mulrooney of Jackoway et al has provided entertainment and other high net worth individuals and families with sophisticated tax, charitable and estate planning.

Jones & Lester LLP
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For over 30 years, Jones & Lester LLP attorneys have provided a wide spectrum of legal services to individuals and business entities, including estate and succession planning.

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Widely recognized as a leader in estate planning, Marshal Oldman and his firm have served clients throughout California for more than thirty years.

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****rated "AV" by Martindale-Hubbell (the highest peer rating given to attorneys)****

**** awarded by Goldline Research one of the "top 10 Most Dependable Lawyers (Trusts and Estates) of California for 2008" (noted in Forbes, June 30th 2008 edition)****

PRESENTATION TOPICS

Jeffrey M. Verdon, Esq. is an internationally-recognized advanced estate planning and asset protection attorney who has been presenting at various corporate and investor conferences such as the Money Show and Freedom Fest, as well as investor cruises (including InvestorPlace Media, Crystal, and Oxford Club), for over 20 years.

Mr. Verdon's presentations, which are primarily geared towards high-net-worth investors, business owners, and professionals, cover key estate planning, asset & lifestyle protection, and taxation planning topics. During his dynamic, high-energy, and informative seminar, Mr. Verdon reveals advanced legal strategies that thousands of high-net-worth clients have utilized to prevent loss due to frivolous creditor claims and to ensure that their estates pass to their heirs without being reduced by estate taxes.

Key topics covered in Jeffrey M. Verdon's seminars include:

- **How to make estate taxes voluntary, no matter what Congress eventually does with the estate tax law**
- **Tax efficient portfolio management—How to convert taxable income into tax-free income using VUL**
- **Top 3 estate freezing strategies**
- **How to protect assets from liability utilizing offshore asset protection trusts**
- **Asset and Lifestyle protection—Offshore vs. Domestic?**
- **Reducing your life insurance outlay by 75%-90%**
- **Premium financing life insurance—How to take advantage of life insurance for your estate planning, without paying the premiums**
- **Utilizing Captive Insurance as an effective strategy for business costs saving... and more**
- **What every successful investor should know about estate tax planning under a Democratic Congress**
- **Eliminating tax on investment income using life insurance**

PRESENTATION TOPICS

Following is a description of Jeffrey M. Verdon's most highly sought after seminars:

Asset Protection as a First Line of Defense

Developers and investors are frequent targets of lawsuits. Without the proper forethought and planning, you can expect to spend fortunes litigating cases, file for bankruptcy, or simply pay the claims for lack of a better option. With the recent downturn in the economy, frivolous lawsuits are on the rise and more investors and developers are turning to asset protection planning as a first line of defense to protect not only their assets but also their lifestyle against potential creditor claims. In this dynamic presentation by one of the country's leading taxation and wealth protection planning attorneys, you will learn the keys to developing a successful asset and lifestyle protection plan that will make your estate "judgment proof."

ESTATE PLANNING FOR WOMEN ONLY - NO MEN ALLOWED

This workshop is exclusively for women—men will be refused entry!

It is a fact that over 90% of women will at some point in their lives be solely responsible for their finances, making estate planning an essential topic for women. In this high-energy, interactive seminar, attendees will learn all the pertinent issues women should know about estate planning and how to prevent the pitfalls of a poorly planned estate. Presented by one of the country's leading estate planning lawyers, you won't want to miss this workshop!

POST- ELECTION TAX AND ASSET PROTECTION STRATEGIES FOR THE SUCCESSFUL INVESTOR/DEVELOPER

What are the critical tax and estate planning considerations under the Obama administration and its proposed tax law changes? Are your assets properly protected from a potentially financially-ruinous lawsuit? Do you know how to convert your taxable investment income to tax-free income? How can your estate capitalize on the economic downturn? All these questions and more will be addressed in this dynamic presentation by one of the country's leading taxation law and wealth protection planning attorneys. If you are a successful investor who wants to be armed with the critical knowledge to ride this economic storm and be prepared for the changes under the new Democratic administration, this seminar is a must.

RECENT ENGAGEMENTS

Jeffrey M. Verdon, Esq. has presented estate planning, taxation planning, and asset protection seminars to over 10,000 people in his 30 years of law practice, speaking to legal, financial, investor, and corporate groups. Here is a partial list of seminars for the 2010-2011 timeframe.

The World MoneyShow, Las Vegas, NV - May 10-13, 2010

Estate Planning for Women Only—No Men Allowed

Tax Efficient Portfolio Management

Leveraged Life Insurance: Stop Paying Life Insurance Premiums Forever

Tax and Asset Protection Planning for the High-Net-Worth Investor

FreedomFest, Las Vegas, NV – Jul 7-10, 2010

Estate Planning for Women Only—No Men Allowed

Tax and Asset Protection Strategies for the High-Net-Worth Investor

SouthPac Offshore Institute Conference, Paradise Island, Bahamas – Oct 28-29 2010

Panel Discussion: Building and Marketing the Successful Asset Protection Practice

FreedomFest World Economic Summit, Paradise Island, Bahamas - Feb 16-19, 2011

Introductory Estate and Wealth Planning for Women Only—No Men Allowed

The New Estate and Gift Tax Law and How to Profit From It

Panel: Going Offshore: Privacy and Tax Advantages

InvestorPlace Media Cruising to Health and Wealth, Singapore to Mumbai – Mar 15-29, 2011

The New Estate and Gift Tax Law and Basic Asset Protection Strategies

Advanced Estate and Asset Protection Planning and How to Profit From It

The World MoneyShow, Las Vegas, NV – May 10-13, 2011

Introductory Estate & Wealth Planning for Women Only—No Men Allowed

The New Estate and Gift Tax Law and Basic Asset Protection Strategies

Investors Masters Symposium: The Case for Using Your \$5M Gift Exclusions Now

2-Hour Special Event: What Every Successful Investor Should Know About the New Estate and Gift Tax Law and How to Profit From It

FreedomFest, Las Vegas, NV – Jul 14-16, 2011

Introductory Estate and Wealth Planning for Women Only—No Men Allowed

Advanced Estate and Asset Protection Planning and How to Profit From It

The 18th InvestorPlace.com Media Investment Cruise, Miami to Caldera – Jan 17-27, 2012

What Every Successful Investor Should Know About the New Estate & Gift Tax Law and How to Profit From It

TESTIMONIALS

Here is what attendees are saying about Jeffrey M. Verdon's highly interactive, dynamic, and informative seminars.

“Excellent content succinctly delivered. Thank you!!”

–Clifford N., CO

“Great presentation... I learned numerous tax planning strategies for my high-net-worth clients.”

–Thomas P., VA

“Extremely enlightening and excellent food for thought... and action!”

– M.J. Rowe, CA

“Excellent presentation. Very informative.”

–Diane S., TX

“Thank you for answering the audience's individual questions...most interesting.”

–Anon.

“I have a tremendous amount of respect for Jeffrey. He is as sharp and sophisticated as a trust attorney can be.”

–Richard J., CA



Jeffrey M. Verdon, Esq.

SPEAKER BOOKING INFORMATION

Jeffrey M. Verdon, Esq. is available for speaking engagements at conferences and meetings of varying lengths and formats—from keynote presentations to full-day workshops.

To schedule Jeffrey M. Verdon, Esq for your meeting or conference, please contact:

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