

STRATEGIC CLIENT ALLIANCE PROGRAM

Protecting and keeping your client.

For Attorneys Who Care About Their
Clients' Financial Legacy and



Want to Keep Them In-House

Your colleagues down the hall practice in many areas. For the one thing your client wants safeguarded more than anything else, his legacy from death taxes and lawsuits, there is no in-house expert.

Protecting an inheritance is serious business and while most estate planning lawyers focus on what will be left when the client dies, we worry about exposure to lawsuits that can strip the client bare. Conventional estate planning is satisfactory for most, but for your "A" list clients, a more comprehensive estate planning solution is needed.

This is your client, possibly a dear friend. You want to know without a doubt that you've placed him in good hands

— surgeon's hands — that take your client seriously. Our 30-years of singular focus with our concierge-level service allows us to handle each delicate matter as if it were our family's wealth at stake.

Referrals That Stay 'In-House'

Mission creep has killed many referral relationships. If you refer a client to us, that client is not leaving your building. Our work is exclusively dedicated to trust & estate work and strategic asset protection. We work as though we are on your team and do not steer clients elsewhere.



Sustaining a Thriving Legacy

VIP clients with “deep pockets” are attractive targets for litigation, and their assets held in a traditional revocable living trust will provide no protection whatsoever. Savvy creditors, a market collapse, aggressive regulations, new tax laws, and cyber hijack artists all pose threats to financial legacies.

Removing economic incentives, while not running afoul of the myriad of ethical and legal standards, requires highly-seasoned skills beyond the routine trust and estate planning structures. Robust asset protection planning creates rock solid security to prevent future unforeseen financially ruinous lawsuits.

“Fire Wall” Protection

Creating real protection takes the experience and wisdom to create customized solutions that stand the test of time. For more than 30 years, our clients’ estate plans have enjoyed superior “fire wall” protection, many of which have been invoked to protect their financial security following a threatened lawsuit.

The Numbers

For over 30 years we have focused on a single practice area. The team at the Jeffrey M. Verdon Law Group has handled several thousand trust and estate plans. Jeff Verdon has personally handled hundreds of trusts and estate plans, most of which contain strong “firewall” protection. Some of the firm’s successes include:

\$58.0M Judgment settled for \$7M

\$34.0M Malpractice suit settled for less than \$1M

\$32.0M Bank loan disputes settled for \$2.5M

\$20.0M Personal guarantee settled for \$1.5M

\$75.0M Personal loan settled for \$5M, paid over 5 years

Firm-to-Firm Alliance & Benefits

Firms that engage in our “in-house” services can choose from one of four offerings we provide in appreciation for the enormous trust you’ve placed in us.

- Referral honorarium of 15% paid to you or your firm
- 15% discount on our services to your client
- Donation of 15% of our fees made to your client’s charity of choice
- Donation of 15% to the charity of your choice or that of your firm

FAQ by Our Attorney Referral Partners

Q We are aware of the state bar rule that mandates all referral fees must be disclosed to the client. How have other firms approached this with their partners in discussing the Firm-to-Firm alliance program?

A Firms that have entered into alliance programs with us and chose to direct the honorarium to their practice or firm have explained it to their clients in these steps, much like they would with someone they might refer within their firm:

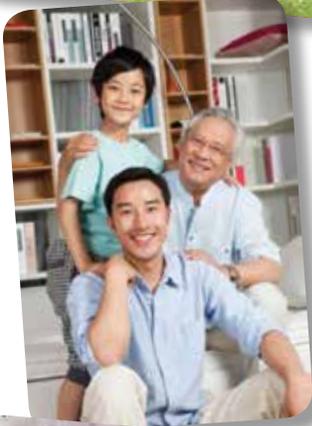
We work with the Jeffrey M. Verdon Law Group, which comes highly recommended from several independent sources. In full disclosure, you should know that some firms offer other law firms referral fees. The Jeffrey M. Verdon Law Group is one of them. Jeff also just happens to be the best at what he does and has a sterling track record. If you work with him, Jeff’s firm will provide one of these two options. Do you have a preference of how you would like this applied?

- A. 15% discount off his services to you
- B. Donation of same amount made to your charity of choice

Q How is the Jeffrey M. Verdon Law Group different from other trust and estate planning firms?

A For 30 years asset protection and advanced estate planning for ultra-high net worth clients has been our singular focus. At Jeffrey M. Verdon Law Group your clients will get more than you expect, and exactly what they need.





What Other Law Firms Say

"We don't think twice about encouraging our attorneys to refer Jeffrey Verdon to clients. His work is superior and they love him. It's like having a trust and estate practice in-house without the overhead."

Bill Gould, Esq., Troy & Gould

"My client faced a \$75 million debt collection lawsuit and Jeff Verdon's estate planning design helped me settle the claim for \$5 million. Our client is incredibly relieved and thrilled with the result."

William Lobel, Esq.

Recent Quotes In the News

"Insulating Your Assets from Lawsuits" appeared in the *Wall Street Journal*, June 29, 2014

"Guard and Protect", an article about the Jeffrey M. Verdon Law Group, appeared in the *Daily Journal*, June 27, 2014

"Cook Islands, a Paradise of Untouchable Assets" appeared in the *New York Times*, December 14, 2013

Contact Us

If you would like to know more about how a Firm-to Firm Alliance can protect your client's financial legacy and benefit your partners, please contact us today for a private consultation.



**JEFFREY M. VERDON
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The Fusion of Planning and Protection.

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