SPEAKER MEDIA KIT

ABOUT JEFFREY M. VERDON, ESQ.

Jeffrey M. Verdon, Esq. is the Managing Partner of the Jeffrey M. Verdon Law Group, LLP, a Trust & Estates boutique law firm located in Newport Beach & Redwood City, California. Mr. Verdon's law firm has been representing affluent families and business owners to solve their complex and vexing wealth transfer challenges focusing on comprehensive estate planning with asset protection for more than 3 decades and is internationally recognized as an expert in his field.

Mr. Verdon regularly lectures at both land-based financial and investment conferences, law related conferences, insurance industry conferences, and aboard luxury cruise ship investment conferences and similar U.S. and international investment conferences teaching his audiences how to increase their wealth through minimizing their taxes and protecting their family legacies with prudent asset protection strategies. Jeffrey regularly collaborates with local and national law firms, providing accredited CLE programs on The Secrets of the Ultra Rich.

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

At the **Jeffrey M. Verdon Law Group, LLP**, we believe in helping our clients make sense out of the planning opportunities available to the affluent family and successful business owner. Our boutique law firm environment located in Newport Beach and Redwood City, CA, serves clients around the U.S. and overseas, generally with estates of $10M to $500M. We believe our clients should pay no more taxes than legally required, as we believe that our clients, not some government bureaucrat, are capable to deploy their tax savings in a more efficient and targeted manner. Through our Comprehensive Estate Planning platform, we optimize income and estate tax deferral opportunities that are found in the Tax Code and approved by the IRS in its private and public rulings, while placing effective "firewalls" around the assets to protect against future unforeseen lawsuits.

The firm enjoys established relationships with some of the "best in breed" strategic advisors, true experts in diverse fields who can further assist in designing and implementing the ideal strategy for our clients. We match our clients with the right strategic advisor to meet the need, whatever it may be, and save our clients from worrying about any uncertainties when seeking the services of skilled legal, investment, and financial professionals integral to a well-qualified team. Finally, with our unique approach to "fixed fee" billing, our clients will always know the cost of services before committing to engage the law firm.

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)

Instructor

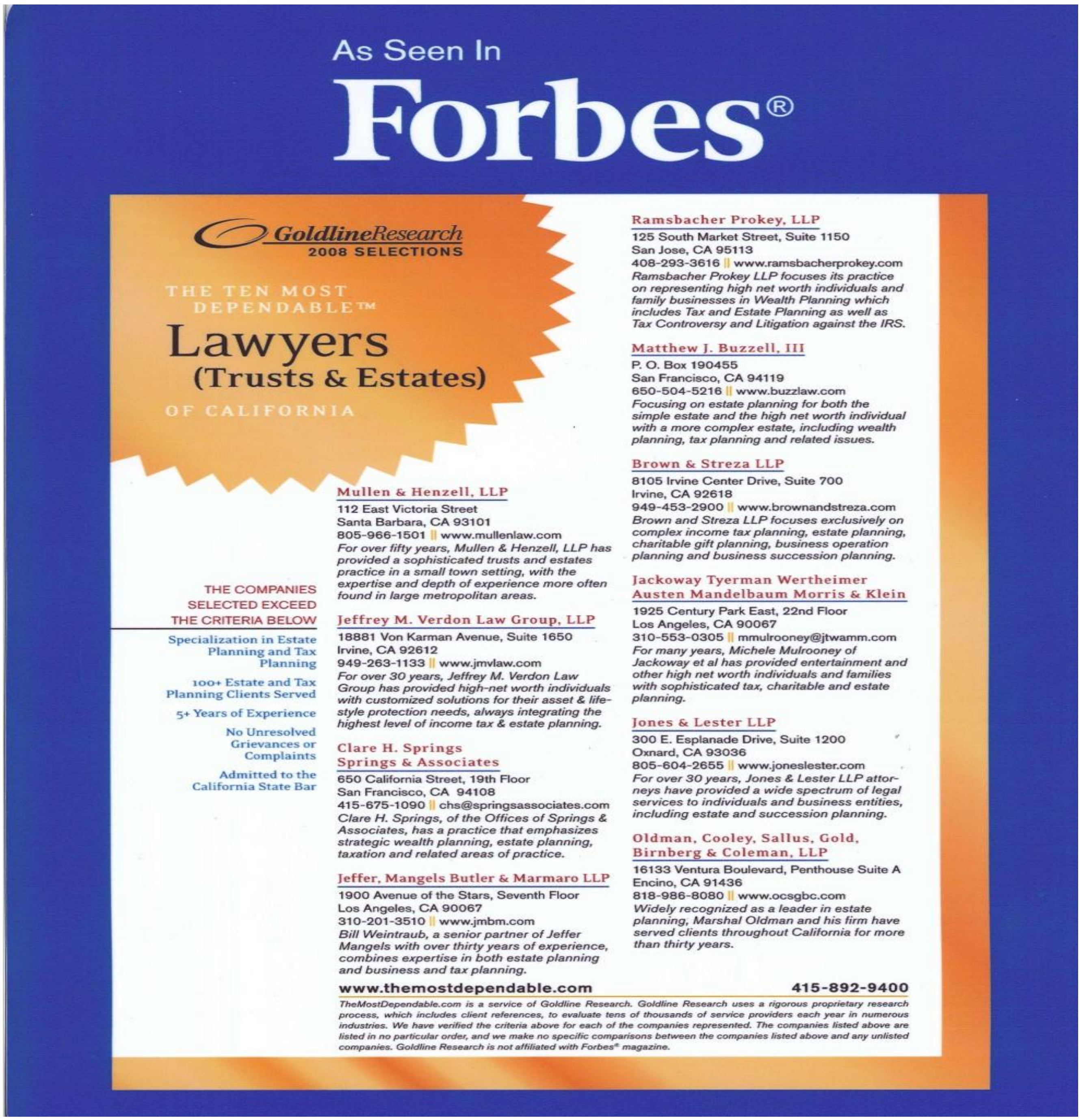
Business Law, Brooks College, 1977-1978
Fellow and Senator, Isle of Man-based Offshore Institute
CEB "Asset Protection Planning", panelist 1995-1996

Publications (see page 10)

ABOUT JEFFREY M. VERDON, LAW GROUP, LLP

****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)****



As Seen In

Forbes®

GoldlineResearch
2008 SELECTIONS

THE TEN MOST DEPENDABLE™
Lawyers
(Trusts & Estates)
OF CALIFORNIA

THE COMPANIES SELECTED EXCEED THE CRITERIA BELOW

Specialization in Estate Planning and Tax Planning

100+ Estate and Tax Planning Clients Served

5+ Years of Experience

No Unresolved Grievances or Complaints

Admitted to the California State Bar

Mullen & Henzell, LLP
112 East Victoria Street
Santa Barbara, CA 93101
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.

Jeffrey M. Verdon Law Group, LLP
18881 Von Karman Avenue, Suite 1650
Irvine, CA 92612
949-263-1133 || www.jmvlaw.com
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
650 California Street, 19th Floor
San Francisco, CA 94108
415-675-1090 || chs@springsassociates.com
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.

Jeffer, Mangels Butler & Marmaro LLP
1900 Avenue of the Stars, Seventh Floor
Los Angeles, CA 90067
310-201-3510 || www.jmbm.com
Bill Weintraub, a senior partner of Jeffer Mangels with over thirty years of experience, combines expertise in both estate planning and business and tax planning.

Ramsbacher Prokey, LLP
125 South Market Street, Suite 1150
San Jose, CA 95113
408-293-3616 || www.ramsbacherprokey.com
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.

Matthew J. Buzzell, III
P. O. Box 190455
San Francisco, CA 94119
650-504-5216 || www.buzzlaw.com
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.

Brown & Streza LLP
8105 Irvine Center Drive, Suite 700
Irvine, CA 92618
949-453-2900 || www.brownandstreza.com
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
1925 Century Park East, 22nd Floor
Los Angeles, CA 90067
310-553-0305 || mmulrooney@jtwamm.com
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
300 E. Esplanade Drive, Suite 1200
Oxnard, CA 93036
805-604-2655 || www.joneslester.com
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.

Oldman, Cooley, Sallus, Gold, Birnberg & Coleman, LLP
16133 Ventura Boulevard, Penthouse Suite A
Encino, CA 91436
818-986-8080 || www.ocsgbc.com
Widely recognized as a leader in estate planning, Marshal Oldman and his firm have served clients throughout California for more than thirty years.

www.themostdependable.com **415-892-9400**

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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**

Below are some of Jeffrey M. Verdon's most sought-after seminars:

Asset Protection as a First Line of Defense

Affluent families and business owners are frequent targets of lawsuits. Without the proper forethought and planning, if sued 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 of these people are turning to comprehensive estate planning and 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 more "bullet proof".

Creating Income Tax Savings to Grow Your Wealth with Premium Financing

Premium financed life insurance is a "disruptive technology" that transformed the manner in which large life insurance policies are purchased today. The NING Trust is a trust to shelter CA source investment income and out of state capital gains, using state income tax savings to create a secondary asset class called life insurance. The presentation will explain the fundamentals of premium financed life insurance by the man who invented it 20 years ago, and when combined with the NING Trust and the HYCET Trust, can be a powerful financial planning and income and estate planning tool.

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.

Estate Planning For Women Only

This workshop is exclusively for women!

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!

SPEAKING ENGAGEMENTS

Jeffrey M. Verdon, Esq. has presented estate planning, taxation planning, and asset protection seminars to over 100,000 people in his 30 years of law practice, speaking to legal, financial, investor, and corporate groups. Here is a partial list of speaking engagements:

2019

Campbell Green Law, January 24, 2019
Presentation: “Secrets of the Ultra Rich”

Marcum, February 19, 2019
Presentation: “Secrets of the Ultra Rich”

MDR Insurance and Financial Services, April 18, 2019
Presentation: “Secrets of the Ultra Rich”

5th Annual Real Estate Family Office & Private Wealth Management Forum, April 29-30, 2019, Dana Point, CA
Panel Member

Offshore Planning Institute Conference, May 1-3, 2019, Four Seasons Hotel, Nevis, West Indies
Presentation: “Current Trends and Strategies Shaping the Industry”

Lunch and Learn Nano Bank, July 11, 2019
Presentation: “Secrets of the Ultra Rich”

2018

Entrepreneurs Organization Forum, April 3, 2018
Presentation: “The Secrets of the Uber Rich”

Provisors Long Beach Airport, April 11, 2018
Presentation: “Tools of Asset Protection Planning”

Steven Bender Forum, April 13, 2018
Presentation: “The Secrets of the Uber Rich”

Bijan Noori, Kamil Wozowicz Lunch and Learn, May 16, 2018
Presentation: “The Secrets of the Uber Rich”

Orange County Bar Association Real Estate Section, May 22, 2018
Presentation: “Tools of Asset Protection for Real Estate Lawyers and Their Clients”

Guardian Strategic Wealth Designs, August 16, 2018
Presentation: “The Secrets of the Uber Rich”

Collins Mason and Company, September 19, 2018
Presentation: “The Secrets of the Super Wealthy”

Banyard Inn of Court, September 26, 2018
Presentation: “Tools of Asset Protection for Real Estate Lawyers and Their Clients”

Guardian Strategic Wealth Designs, November 13, 2018
Presentation: “The Secrets of the Ultra Rich”

2017

The MoneyShow San Francisco, August 24-26, 2017, Marriott Hotel, San Francisco, CA
Presentation: "Estate Planning for Women Only"; "The Secrets of the Filthy Rich"

CalCPAs Estate and Trust Group, August 17, 2017, San Jose, CA
Presentation: "Secrets of the Ultra Rich: Planning Strategies Your Clients Will Be Asking For"

Offshore Planning Institute Conference, May 31 – June 1, 2017, Four Seasons Hotel, Las Vegas, NV
Presentation: "Current Trends and Strategies Shaping the Industry; Asset Protection Due Diligence: "What Lawyers Must Do to Protect Themselves"

Peak Trust Company, May 2, 2017, Webinar
Presentation: "Secrets of the Ultra Wealthy"

Orange County Bar Association: Tax Section, March 9, 2017, Newport Beach, CA
Presentation: "Asset Protection Strategies for Lawyers and Their Valued Clients"

TESTIMONIALS

"To a very large extent, the Federal Estate and Gift tax is a "stupidity tax" because rich people have insinuated into the tax code myriad ways to avoid these taxes…

No one does a better job of using the minutia of the tax *Code* to protect his clients than Jeffrey Verdon. Preeminently, Jeffrey understands his clients and their specific goals; he does not just apply standard algorithms in a "one size fits all" fashion. Jeffrey's estate plans take into account such things as a child's potential divorce, a spouse's possible infelicitous remarriage or an heir's possible lack of ambition or addiction.

I have known Jeffrey for almost thirty years and, because I am a litigator and not an estate lawyer, I always refer my clients to Jeffrey for estate and asset protection work… Much of my faith in Jeffrey comes from the fact that he is very careful. Although the tax code is riddled with special interest provisions, the last thing a person wants to do is play fast and loose with the IRS. Jeffrey dots every "i" and crosses every "t". Although he saves his clients millions of dollars, every one of his plans will withstand a careful IRS audit."

Richard Neely
Former Chief Justice, West Virginia Supreme Court of Appeals

"Jeff Verdon is one of the most creative attorneys I work with when it comes to using the law to solve business issues for clients. Clients that I refer to him are uniformly happy with the service he provides and the interest he takes in creatively resolving their problems.

Jeff listens carefully to the client wants and finds ways to satisfy those needs. He also is very good at following up with clients to be sure the strategies he creates, and implements are working. I can unequivocally recommend Jeff as an attorney and as a person."

William Lobel, Esq.
Newport Beach, CA

"Our relationship with Jeffrey Verdon began in 1991 after we had a series of disappointments with mediocre advisers. From the onset, Jeffrey took the time to get to know our family, learn about our values and goals, and recommended those strategies that made sense for us. He is innovative and creative and even steered us through the first IRS approved Super Freeze estate plan, a strategy that quickly became commonly used by planners around the country. For nearly a quarter of a century he has been part of our team of advisors to help grow our investments protect our assets from lawsuits in a manner that reflected our family's values. As our businesses grew in complexity, Jeffrey adapted our planning accordingly, and through his extensive list of professionals, always connected us with the most qualified experts nationally when such was necessary. As my wife Dorothy and I weave our way through several profit and non-profit corporations as well as several complex affiliations with other entities, Jeff has always been able not only to structure these superbly, but he always expertly steered us throughout all the inevitable complexities and exigencies. We have been fortunate in having his advice all these years, as well as his and his wife's dearest friendship."

Dr. Nicholas A. Cummings, Board Chair, the Cummings Foundations,
and former President, the American Psychological Association

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:

Kathryn Weber
Director of Client Services
Jeffrey M. Verdon Law Group, LLP
Office: 949-333-8152
kathryn@jmvlaw.com

Publications

"The Do Over Trust – Protecting Your Adult Children from Themselves", (Jeffrey M. Verdon Law Group, LLP, Kiplinger, March 4, 2019)

"A Risk That Could Cost You Everything: The Dunning-Kruger Effect", (Jeffrey M. Verdon Law Group, LLP, Kiplinger, December 3, 2018)

"Your Estate Could be Bankrupt Unless You Protect Against This", (Jeffrey M. Verdon Law Group, LLP, Kiplinger, June 14, 2018)

"There is No Place Like Home: Mature Foreign Asset Protection Trusts are Coming Home", (Jeffrey M. Verdon Law Group, LLP, Kiplinger, February 14, 2018)

Jeffrey M. Verdon, Esq. is an ongoing contributor to the Kiplinger Wealth Creation Column.
(View previous publications at www.jmvlaw.com, Media Center tab)

Client Alerts

"Second Passport? Here's Why You May Want One" (April 18, 2019)

"What You Need to Know about Giving Money to Your Grandchildren" (April 10, 2019)

"California Estate, Gift and Generation-Skipping Transfer Tax Proposal" (March 29, 2019)

"Financial Planning Advice for Executive Women" (March 24, 2019)

(View previous Client Alerts at www.jmvlaw.com, Client Alert tab)