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WealthCounsel is dedicated to providing the tools and technology that each estate planning office requires for success. Members in WealthCounsel have access to the industry's leading-edge estate planning systems, WealthDocx®.

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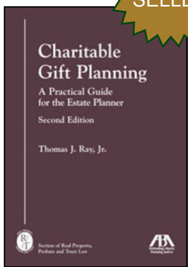
ESTATE PLANNING

TOP SELLER



CHARITABLE GIFT PLANNING:
A PRACTICAL GUIDE FOR THE ESTATE PLANNER, 2ND ED.

Author: Thomas J. Ray, Jr.

This is a practice-focused book that provides clear and insightful explanations of tax law, financial considerations, drafting guidelines, and forms for practitioners interested in planning for clients' charitable giving needs as part of a comprehensive estate and financial plan.

458-001

~~RETAIL~~	~~$174.95~~
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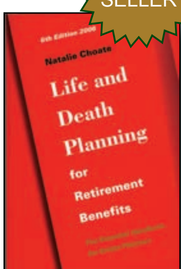
TOP SELLER



LIFE AND DEATH PLANNING FOR RETIREMENT BENEFITS:
THE ESSENTIAL HANDBOOK FOR ESTATE PLANNERS, 6TH ED.

Author: Natalie Choate

Nationally recognized expert Natalie Choate authors this highly recommended book which includes hundreds of tax and other rules affecting your clients' planning choices. A "must have" for your law library!

458-002

MEMBER PRICE	$89.95
REGULAR PRICE	$99.95

SPECIAL PEOPLE, SPECIAL PLANNING

Authors: Peggy R. Hoyt & Candace M. Pollock

This book creates a financial and legal blueprint to address the special person's unique personal and social needs. Families of people with special needs face planning challenges that accompany longer life expectancies - a future without full independence - and the need to maintain an outstanding quality of life.

458-008

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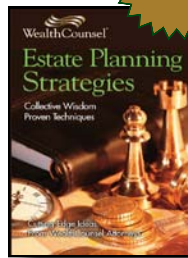

WEALTHCOUNSEL ESTATE PLANNING STRATEGIES:
COLLECTIVE WISDOM, PROVEN TECHNIQUE

WealthCounsel member attorneys have outlined essential estate planning strategies all Americans, no matter their level of wealth, can utilize to plan not only for death and taxes, but to ensure their wishes are carried out exactly as they desire.

23E-000

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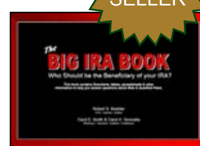

THE BIG IRA BOOK

Authors: Robert Keebler, Cecil Smith & Carol Gonnella

This new book and PowerPoint will enhance your practice and increase your revenues. It is unlike any other book in the nation about the difficult issues of beneficiary designation of retirement plans. Visit www.BIGIRABOOK.com for more information.

458-013

MEMBER PRICE	$495.00
REGULAR PRICE	$595.00

ALL MY CHILDREN WEAR FUR COATS

Author: Peggy R. Hoyt, J.D., M.B.A.

Our pets are loved family members. We worry about them, just like our children. For all these reasons, and so many more, you should explore all the alternatives for planning for your pet's future without you and for your future without your pet.

458-007

MEMBER PRICE	$14.95
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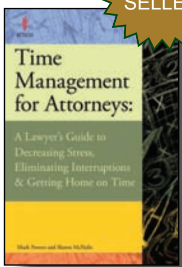

TOP SELLER

TIME MANAGEMENT FOR ATTORNEYS

Author: Mark Powers & Shawn McNalis

Compiled in this book is all the time-tested techniques we have learned over the years and put into an easy-to-use guide just for attorneys. In it are real-life examples, exercises, and client case studies and a CD containing over 50 practice-specific forms.

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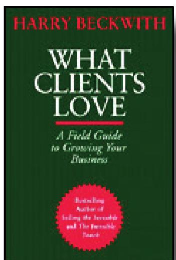

WHAT CLIENTS LOVE: A FIELD GUIDE TO GROWING YOUR BUSINESS

Author: Harry Beckwith

An easy-to-read guide taking client services to yet another level by the author of Selling the Invisible. We spend our careers dictating what our clients want. Perhaps it would be wise to listen to what they want.

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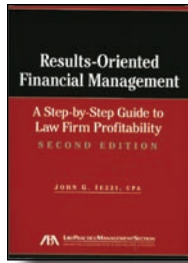
REGULAR $21.95



RESULTS-ORIENTED FINANCIAL MANAGEMENT: A STEP-BY-STEP GUIDE TO LAW FIRM PROFITABILITY, 2ND ED.

Author: John G. Iezzi, CPA

Every law firm needs sound, financial management practices to thrive. Unfortunately, most firms can't afford a highly skilled Chief Financial Officer to develop a well organized and executed financial plan to reach their financial goals and objectives. This book will help firms in this effort.

458-104
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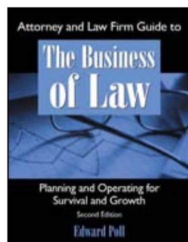

ATTORNEY & LAW FIRM GUIDE TO THE BUSINESS OF LAW

Author: Edward Poll

This expanded edition adds 27 new chapters on marketing, personnel issues, technology, time management, clients' trust accounting, opening a new office, and changing from one practice to another.

458-012
MEMBER PRICE $99.95
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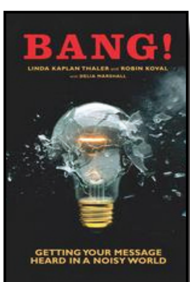
MARKETING YOUR PRACTICE



BANG! GETTING YOUR MESSAGE HEARD IN A NOISY WORLD

Authors: Linda Kaplan Thayer, Robin Koval, & Delia Marshall

Take it from Gordon Bethune, Chairman and CEO of Continental Airlines: "Linda Kaplan Thaler and Robin Koval get it from every angle. This book is full of extraordinary insight on effective message delivery."

458-300
MEMBER PRICE $10.95
REGULAR PRICE $14.95

MARKETING SUCCESS STORIES: CONVERSATIONS WITH LEADING LAWYERS, 2ND ED.

Authors: Joyce K. Smiley & Hollis Hatfield Weishar

This practice building resource is a collection of anecdotes on successful and creative marketing techniques used in a variety of practice settings.

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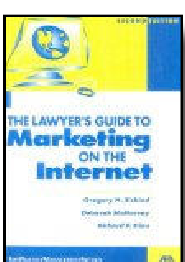


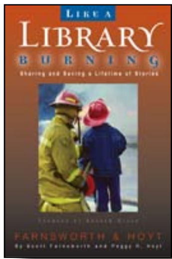
THE LAWYER'S GUIDE TO MARKETING ON THE INTERNET 2ND ED.

Authors: Gregory H. Siskind, Deborah McMurray, & Richard P. Klau

From developing an Internet marketing plan, designing your web site, to following through with publicity, this guide will walk you through steps necessary to marketing your firm on the Internet and enabling you to stay competitive in the marketplace.

458-302
MEMBER PRICE $55.95 REGULAR PRICE $65.95

FOR YOU AND YOUR CLIENTS



LIKE A LIBRARY BURNING

Authors: Peggy R. Hoyt & Scott Farnsworth

This practical, timely book can help you preserve and enhance your true wealth: the richness and meaning of your life, your relationships with those you love most, and your power and influence for good in the world, both now and when you're gone.

458-208
MEMBER PRICE $14.95
REGULAR PRICE $19.95

A MATTER OF TRUST: THE IMPORTANCE OF PERSONAL INSTRUCTIONS

Authors: Peggy R. Hoyt & Candace M. Pollock

This book identifies the types of legal planning directives most people require, including wills, trusts, powers of attorney, healthcare directives, living wills and memorial instructions. It describes when, where, and how to create personal instructions to properly guide your successors.

458-204
MEMBER PRICE $14.95
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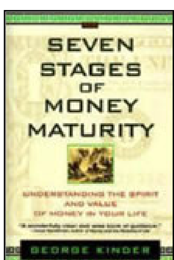

SEVEN STAGES OF MONEY MATURITY

Author: George Kinder

This book presents an original look at the ins and outs of individual economics. Kinder combines the philosophical and the practical to help readers broaden their understanding of the overall role that money plays in life from childhood onward--and, more importantly, put themselves on firmer footing with it today.

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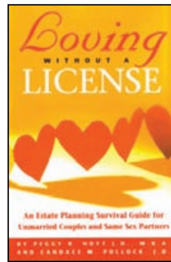
REGULAR PRICE $20.95



LOVING WITHOUT A LICENSE

Authors: Peggy R. Hoyt & Candace M. Pollock

This book explores the unique estate planning challenges of unmarried couples and same sex partners-life alliance partners. In an easy-to-read, easy-to-understand format, discover the estate planning techniques and directives that allow you and your partner to protect yourselves and each other.

458-206
MEMBER PRICE $14.95
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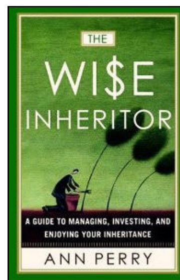

THE WISE INHERITOR

Author: Ann Perry

A guide to managing, investing, and enjoying your inheritance. The complete guide for managing the financial, legal, and emotional issues of inheritances large and small. Perry's insightful examination of the challenges make managing a bequest a little easier.

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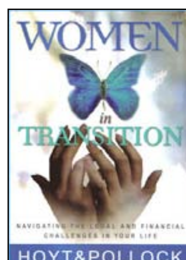

WOMEN IN TRANSITION

Author: Peggy R. Hoyt & Candace M. Pollock

Women take the experience and resources at each phase as the foundation for the next phase. This book will teach you how to build your own solid foundation to protect yourself and the people and things you cherish.

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MEMBER PRICE $15.95
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23D-101	Introduction to Irrevocable Trust Planning on DVD	Peter Parenti and Matthew McClintock	$250.00	$395.00
23D-103	Comprehensive Planning with Wills, Trusts, and Ancillary Documents on DVD	Peter Parenti and Matthew McClintock	$500.00	$695.00
457-700	IRAs Payables to Trusts on CD	Robert Keebler and Lew Dymond	$350.00	$350.00
	Completely updated for the $3.5 million exemption, new PLR and rev rulings and asset protection issues under the Commerce Bank Doctrine. An absolute MUST for every estate planning lawyer.			
23D-352	Planning in a Low Interest Rate Environment -Designing and Drafting GRATs, Sales to IDGTs and Other Strategies with WealthDocx on DVD	D. Scott Schrader and Matt Brown	$500.00	$695.00
32D-600	The Business of Law® on DVD	Edward Poll	$ 329.00	$459.00
23D-353	The Business of Law® Case Study Analysis on DVD	Edward Poll	$250.00	$375.00
23D-354	Overview of Estate Administration Law and Process - Developing an Estate Administration Practice as a Profit Center on DVD	Stephen Mancini and Matthew McClintock	$250.00	$395.00
23D-350	Trust Administration Workshop on DVD	Dan Collins and Stephen Mancini	$500.00	$695.00
23D-351	Administering Estates – SettlementCounsel Processes & Practices on DVD	Stephen Mancini and Nina Rosson	$249.00	$399.00

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ESTATE PORTFOLIO TABS

- Introduction
- Overview
- Living Trust Agreement
- Will
- Nominations
- Personal Information
- Funding Instructions
- Power of Attorney
- Certificate of Trust
- Trustee Affidavit
- Privacy Affidavit
- Trust Assets
- Health Care
- Memorial Instructions
- Property Agreements
- Personal Effects
- Other Documents

CORPORATE PORTFOLIO TABS

- Organizational Resolutions
- Bylaws
- Stock Certificates
- Register of Shareholders, Officers and Directors
- Financial Statements
- Tax Information and Tax Returns
- Shareholder Agreements
- Compensation Plans and Compensation Resolutions
- Fringe Benefit Plans
- Third-Party Agreements & Contracts
- Minutes & Written Consent Actions
- Other

RETIREMENT TRUST PORTFOLIO TABS

- Overview
- Trust Agreement
- Certificate of Trust
- Asset & Beneficiary Designations
- Tax Filings
- Financial Statements
- Correspondence

ORGANIZATION PORTFOLIO TABS

- Table of Contents
- General Information
- Certificate/Articles
- Organization Agreement
- Management Tools/Agreement
- Tax Filings
- Asset List/Valuation Reports
- Funding Documents
- Contributions
- Transfers of Interests
- Ownership Certificates
- Plans and Minutes
- Correspondence
- Miscellaneous
- Operations Manual

IRREVOCABLE TRUST PORTFOLIO TABS

- Introduction
- Trust Agreement
- Overview
- Trust Assets
- Tax Filings
- Correspondence
- Instructions To Trustee
- Certification of Trust
- Demand Right Notifications
- Charitable Deduction Calculation
- Investment Reports and Agreements

WILL PORTFOLIO TABS

- Overview
- Will
- Personal Information
- Power of Attorney
- Health Care
- Memorial Instructions
- Personal Effects
- Other Documents

NEW!
INDIVIDUAL TAB TITLES
(Visit website for full list of 44.)

TRUST ADMINISTRATION PORTFOLIO TABS

Estate Documents:

- Estate Planning Documents
- Funeral/Memorial Instructions
- Death Certificates/Marriage Licenses
- Administrative Trust & Assets
- Subtrusts & Assets
- Distributions & Claims
- Other

Asset Details:

- Real Estate
- Stocks & Bonds
- LLCs, Partnerships, Closely-Held Corps.
- Receivables & Cash
- Life Insurance
- Jointly Owned Property
- Personal Property
- Powers of Appointment
- Annuities, IRAs, Other Retirement Accounts
- Account Rollovers/Beneficiary Designation Details
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- Tax Returns
- Probate Documents

CUSTOM SETTLEMENTCOUNSEL TRUSTEE TABS

- Gathering
- Evaluation
- Initial Visit
- Creating Trustee Authority
- Analyze & Test
- Presenting the Preliminary Plan
- Building the Plan
- Implementation
- Confirmation

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(Choose from two colors: Burgundy or Hunter Green)

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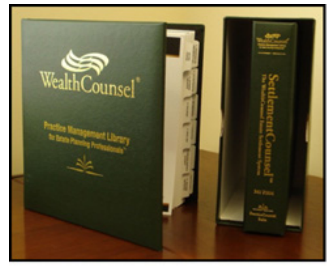

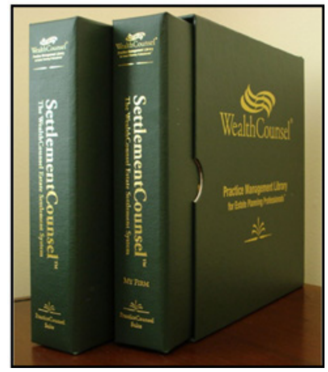

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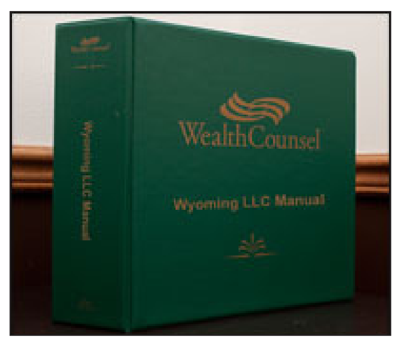
The Manual is a comprehensive package of explanatory summaries, outlines, documents, forms, charts, and marketing materials which will allow you to quickly and easily create Wyoming Close LLCs, and ensure they are properly registered through Teton Agents, LLC. (Note: The manual does not include a form Wyoming Close LLC since WealthCounsel members can easily create an Operating Agreement or approved Wyoming Close LLCs in the WealthDocx® LLC Module. Accordingly, the WealthCounsel member rate for this manual is discounted by $1,400.)



The State of Wyoming is one of, if not the most attractive states, in the country because of its taxes. Bloomberg Wealth Manager magazine has declared Wyoming to be the number one friendliest state for wealthy people. For example, Wyoming has:

- No income tax
- No inheritance tax
- No gift tax
- No franchise tax
- No excise tax
- No business and occupation tax
- Low property taxes

Wyoming is also attractive as the state to choose for the formation of business entities. Choices of business entity have evolved. Historically, corporations were the business entity of choice. However, limited partnerships and limited liability companies have become more popular as they provide greater tax reduction, greater asset protection and are more flexible. In July of 2002, Wyoming's legislature enhanced their Close Liability Company legislation. These statutes are unparalleled when determining a jurisdiction for a business entity for your clients.

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WealthCounsel MarketPlace

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Attract More Business with a Dynamic Online Identity A Customized Website Content and Communication Solution.

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Easy to use Excel templates help you demonstrate to your clients why you are different and why they should pay extra for that difference.

For more info or to preview any of these proven marketing solutions, contact us at 888-659-4069, X 819.

Your Success. Our Commitment.
ELDERCOUNSEL®
Excellence in Elder Law and Special Needs

ElderCounsel provides new and advanced elder law and special needs planning attorneys the critical resources for elder law and special needs planning:

- ElderDocx® - Elder Law and Special Needs Document Drafting System
- Educational Programs on Elder Law, Special Needs and Practice Development
- Member Listserv and Knowledge Base

Why ElderCounsel?
Take the challenge out of elder law and special needs planning. We have the resources you need to succeed.Providing sound legal counsel for elderly and special needs clients has always been a challenge for the elder law attorney.

Complexities of elder law and special needs planning are more easily managed with proper legal training and the ability to exchange idea with your professional community - tools that you simply don't have time to develop on your own. ElderCounsel's Drafting System, ElderDocx, puts a smart, efficient document creation and assembly process right at your fingertips. The software will help you generate the following:

Document drafting system:

- Medicaid Asset Protection Trust
- Income only trust
- Third party and self settled supplemental needs trusts
- Promissory notes
- Medicaid GRAT
- Personal care contracts
- Sole benefit trusts
- Wills and revocable living trusts addressing elder law and special needs planning issues
- Client letters and agency letters
- Advance directives

And much more! See our website for additional documents which are part of the ElderDocx document drafting system.

Website: www.eldercounsel.com
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WealthCounsel MARKETPLACE

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