

Sample Client,

Thank you for using our web-based Exemption Diagnostic System, your results are below:


INTRODUCTION


The Exemption Diagnostic Calculator is designed to help:


1. Quarantine your assets and generally classify them based on creditor risk exposure including the claim, attachment and seizure of assets to frivolous lawsuits, bankruptcies and other unfriendly predators.
2. Identify potential tax weakness or leakage and forfeiture of tax exemptions as well as identify tax weakness and wealth leakage.
3. Show you what assets and amounts can qualify for various creditor and tax exemptions and help quantify your tax savings and creditor exemption defense opportunities.

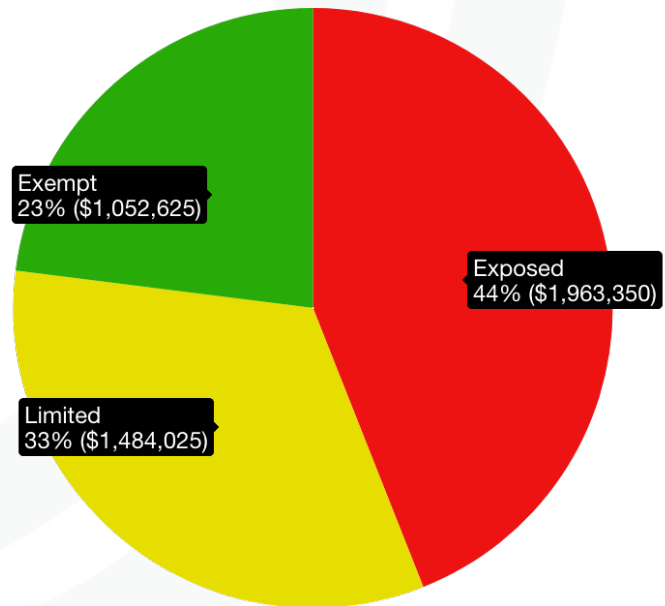
The goal is always to help you fully understand your rights, know you're doing everything you can to better protect, profit and preserve your wealth, and truly maximize your chances for a secure future lifestyle.

Exemption Diagnostic Report

 No Exemptions = Fully Exposed
These assets are fully exposed to creditors, lawsuits and bankruptcy.

 No Exemptions = Limited Protection
These assets can be tactically attacked and potentially seized. It is critical you have these reviewed.

 Basic Exemptions = Offers Protection
These assets should be protected but you will want to ensure they are being properly administrated to protect plan distributions.



*** YOUR TOTAL NET WORTH: \$4,500,000.00**

YOUR CURRENT EXEMPT ASSETS ARE: \$1,052,625 or 23% OF YOUR TOTAL NET WORTH.

BOTTOM LINE: if you were to lose your assets due to an unexpected lawsuit or bankruptcy, would you be able to replenish those values to safely maintain your future lifestyle?

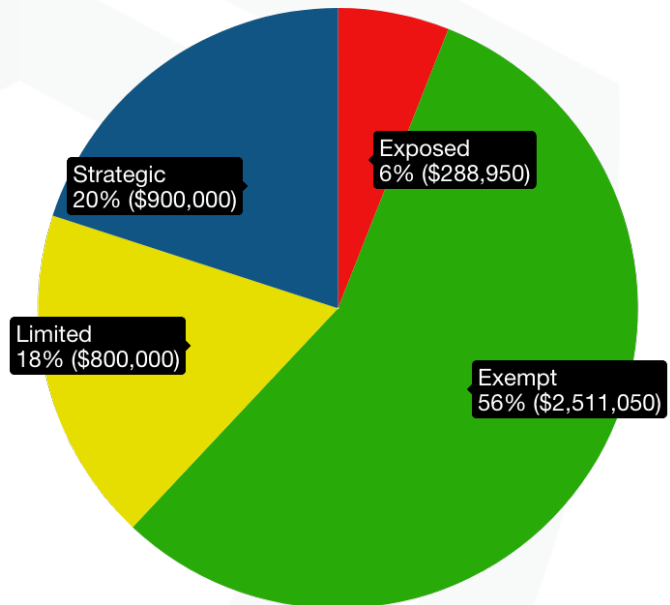
YOUR OPPORTUNITY: find out what your exemption and protection potential is without having to change your existing asset structure or investment strategy.

YOUR TOTAL PROTECTION POTENTIAL IS: **\$3,411,050** or **76% OF YOUR CURRENT ASSETS!**

1. Protect **\$2,511,050** of your current equity by recharacterizing assets as “exempt” for your retirement.
2. Protect **\$900,000** of additional equity using strategic exemption retirement planning.
3. Protect **\$734,017 - \$1,468,033** of future earnings by utilizing the PRIVATE RETIREMENT ACCELERATORSM.

Your Strategic Exemption Plan:

-  Not Exempt = Still Exposed
Your capital risk is minimized to your current lifestyle savings only.
-  Minimized Exposure = Potentially Protected
Your limited risk is reduced substantially but should employ additional risk-management tactics.
-  Recharacterized as Exempt = Protected
Over and above your qualified plan assets, your private assets that can be recharacterized as exempt for your retirement.
-  Strategic Exemption Planning = Protection of Future Values
You can use your future earnings capacity and recaptured tax savings to protect future estate values as well as current equity assets - including your business assets and home equity.



*** \$734,017 - \$1,468,033**
Strategic Protection: Future Income Protection Range based on the cone of uncertainty. Even after you've protected your home and business, you can also potentially protect this additional amount of future income.

YOUR NEXT STEPS:

To get a breakdown of your specific assets that qualify for “exemption,” as well as future earnings that may be pre-funded and protected, please submit an appointment request with one of our Exemption Planning advisors. We will provide you a detailed proposal of your current situation and potential Exemption & Private Retirement Planning opportunities, including:

- Maximizing Creditor & Tax Exemptions, both Federal & State.
- Accelerating current Strategic Protection benefits by leveraging Future Earnings values.
- Maintain cash flows and tax savings benefits to enhance your business profits and investment returns.
- Protection of all funds, distributions and benefits during your lifetime and upon transfer to your heirs.

Call Us Today to get Protected: 800-730-3020 or email info@trust-cfo.com