



Protecting Personal Wealth: Solutions for Asset Management

Lodmell & Lodmell, P.C.

www.lodmell.com • 800.231.7112

Total Asset Preservation Solution

“If we command our wealth, we shall be rich and free.”

– Edmund Burke

In the late 18th Century, Edmund Burke envisioned a nation that was more than just a financial success.

Instead of dollars and coins, he spoke about the ideals of a **truly** wealthy nation – a nation that not only prospered financially, but was secure and stood for the principles of family, freedom and a strong future.

Like Burke, our clients at Lodmell & Lodmell have a vision of wealth that is far more than a balance sheet or bank statement. It is a vision of freedom.



Freedom can manifest itself in a million different ways.

What does wealth mean to you?



- ✓ It may mean the freedom of not having to worry about money, or the dream of retiring early.
- ✓ It may be the ability to work shorter hours and enjoy life away from the office.
- ✓ It means, perhaps, spending more time with friends and family.
- ✓ For some, it may be a nice house and vacation home.
- ✓ For others, it's the ability to send their children to the best schools and universities.
- ✓ To many, it's the power to give back to the community unselfishly.

Clearly, true wealth can't be measured in dollar amounts alone.

It encompasses so much more.

Your Wealth and Freedom are Worth Preserving

Being wealthy means using financial success and the freedom it brings to create a personally fulfilling life.

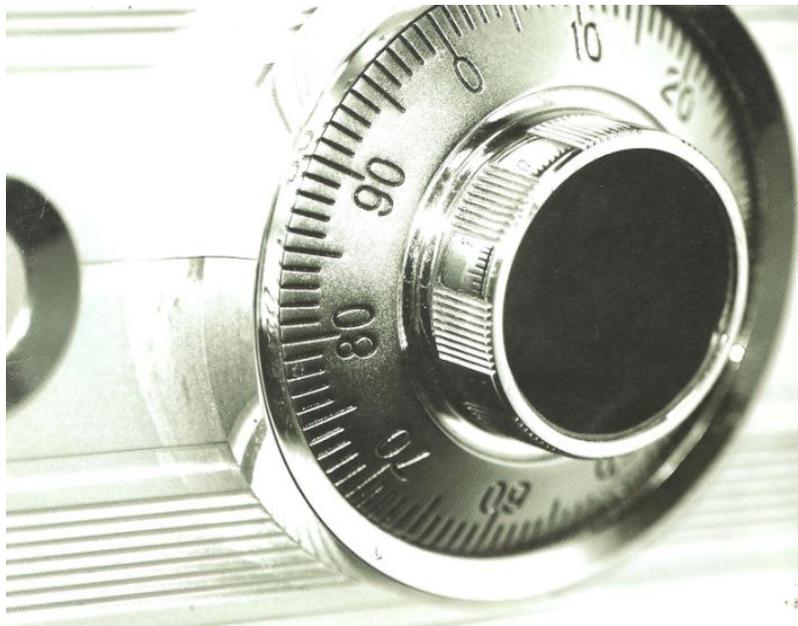


It isn't easy to build wealth. You worked hard. With the right legal tools and guidance, Lodmell & Lodmell can help. We understand what freedom means to our clients.

With our **Total Asset Preservation Solution**, you'll always know your money is secure and protected – so you can focus on living the life you want.

Freedom is Total Asset Preservation

Lodmell & Lodmell, P.C. has already protected over **\$3.5 billion** in assets.



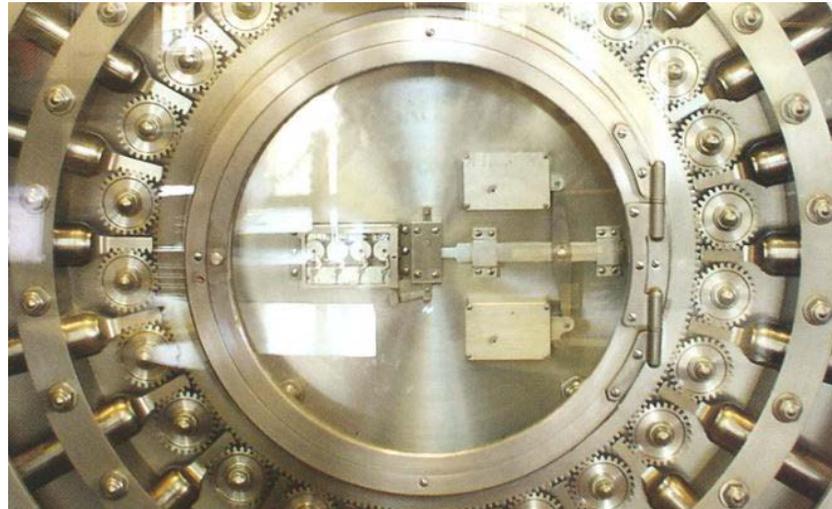
Many previously-vulnerable medical professionals and businesspersons have already discovered our new way to safeguard personal wealth and protect against predators, litigation, and judgments.

Our **Total Asset Preservation Solution™** isn't just a luxury reserved for the unbelievably elite – it's within your grasp. Our vision at Lodmell & Lodmell is to help make your vision of freedom a reality.

A Series of Powerful Components

How do we go about protecting your wealth?

A quality Asset Protection strategy, relying upon the strength of its component parts, is what makes L&L's planning unique.



We don't limit our services to just one or two tools to protect wealth. Instead, we utilize a [series of powerful legal components](#) to build the maximum legal protection.

Providing the Strongest Protection Possible

Carefully integrated into your existing financial planning, our legal tools will do all of the following:

- ✓ Protect your accumulated wealth, including stocks, bonds, cash, CDs and securities
- ✓ Protect your personal residence for up to its full equity value
- ✓ Protect all your real estate investments, including office buildings
- ✓ Protect yourself from the ever-increasing danger of employee lawsuits
- ✓ Protect your family from probate and excessive taxes in the event of your death
- ✓ Protect equipment used in your business or medical practice
- ✓ Protect wealth for a specific use, such as your children's education

It's this **multi-pronged approach** that provides you with a shield tough enough to protect your wealth.

Strategic and Integrated Solutions

Asset Management Limited Partnership™

- ✓ The Asset Management Limited Partnership allows for significant tax planning opportunities and creates a **legal barrier** between your wealth and whoever would take it away from you.
- ✓ It is our most popular domestic Asset Protection tool for assets up to \$250,000 in net worth as well as being central to use with the IWMT.



Strategic and Integrated Solutions

International Wealth Management Trust™

- ✓ At the core of our support solution is the International Wealth Management Trust – the ultimate lawsuit deterrent for clients with assets in excess of \$250,000.
- ✓ This international legal tool levels the playing field for unprotected defendants in the way of an unbridled explosion of abusive litigation.
- ✓ Its primary purpose is to protect and conserve the client's financial resources for future use, benefit and enjoyment by the grantor and beneficiaries.

...And Limited Liabilities

Limited Liability Companies (LLCs)

- ✓ The primary role of LLCs is to compartmentalize “risky” assets – such as investment real estate, rental properties, boats and airplanes – and to insulate individuals and other assets against the LLC's potential liabilities.
- ✓ As a legal business entity, the LLC can generate income and expense that can reduce the taxable income passing through to the Member or Members that own it.
 - In most cases, the LLC's original Member is the Asset Management Limited Partnership. In single-Member LLC's, the Asset Management Limited Partnership's General Partner is also responsible for managing the LLC.
 - This arrangement facilitates upstream liability protection for risky assets that may have to be liquidated into cash and transferred into the safety of the Partnership or possibly an International in lawsuit deterrence.

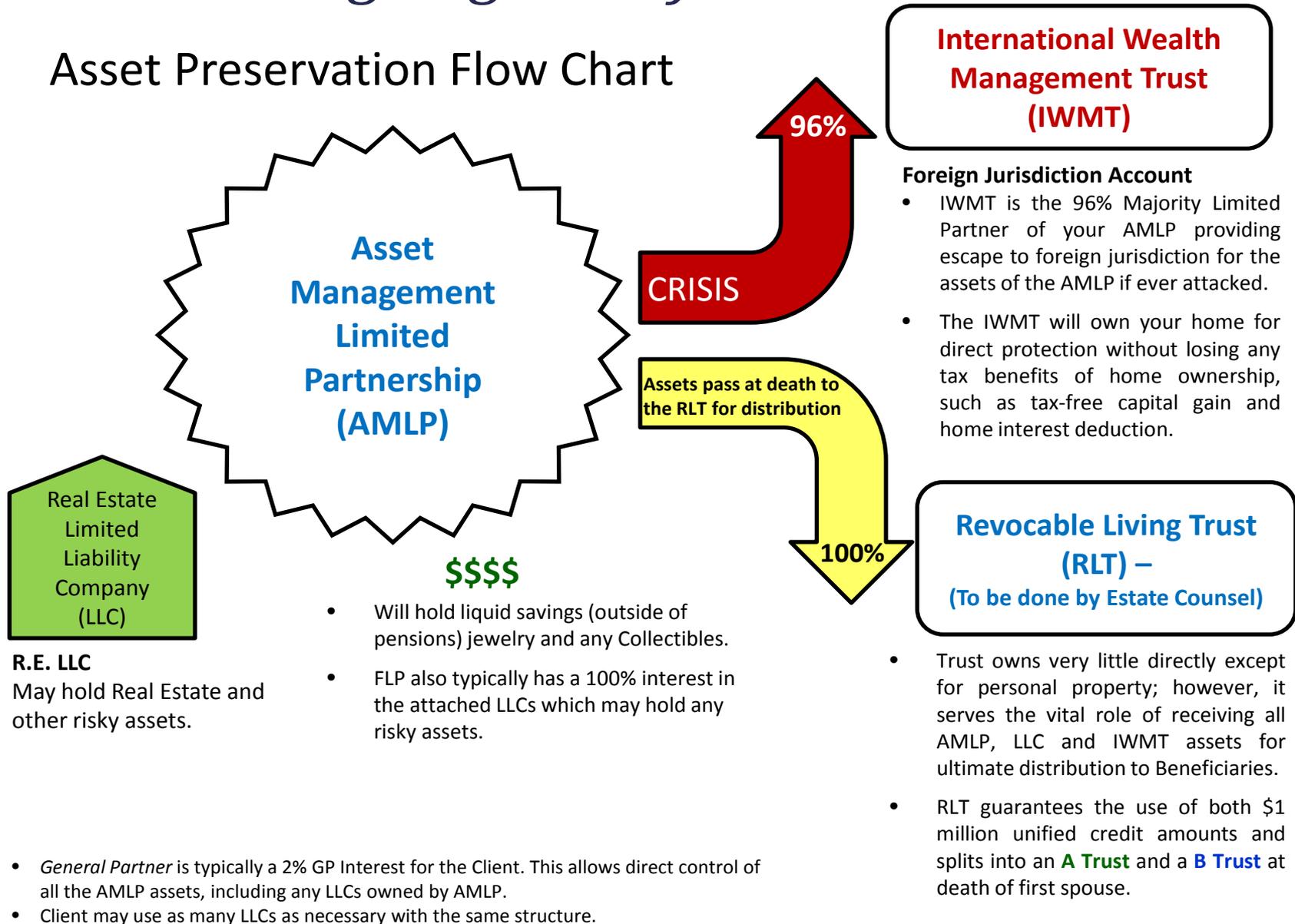
...And Limited Liabilities

Limited Liability Companies (LLCs), cont.

- ✓ When the Asset Management Limited Partnership is the single member of an LLC, as with most of our clients, it acts as a "disregarded entity" and does not require a separate tax return, since all of its accounting would be included on the Asset Management Limited Partnership's return.
- ✓ In all other cases, the Limited Wealth Management Trust, which provides the ultimate Liability Company, is treated as a partnership for income tax purposes.

All Working Together for Your Protection

Asset Preservation Flow Chart



Structured Protection



Our legal tools, integrated into your existing estate planning, corporate and partnership structures, help provide a smooth journey into a lifetime of freedom.

Our Total Asset Protection Solution is a strong, flexible bridge to a prosperous future.

Like the cables of a suspension bridge, we provide the support for years of [litigation-free living.](#)

Fostering Relationships

And our legal tools aren't all that work together seamlessly. Our staff at Lodmell & Lodmell actively supports our client-attorney relationships.

We **match your needs** and **custom-tailor our services**, ensuring the full protection you and your unique life deserve!



Accomplished Counsel

You won't find counsel more perfectly suited to your needs.

Experts in all aspects of Asset Protection, business, estate and tax law, members of Lodmell & Lodmell travel all over the U.S. sharing knowledge and expertise. From practice management seminars to medical study groups to continuing education classes for attorneys, the Lodmell team educates at-risk professionals about the explosion of predatory lawsuits and how to protect personal wealth.

Brothers **Douglass and Benjamin Lodmell** are also published authors and have been interviewed by top media outlets. Their book, *The Lawsuit Lottery: The Hijacking of Justice in America* is a social commentary that attempts to shed light on the “hijacking of justice” by the world’s costliest tort system.

With Trust, Great Things Can Be Achieved

Our clients' satisfaction is the cornerstone and foundation of our business, so **trust is an all-encompassing theme.**



- ✓ We understand it's important for you to trust your attorneys.
- ✓ And we know a successful attorney-client relationship depends on trust.
- ✓ Our firm and attorneys are regulated by the high legal and ethical standards of the Arizona Bar Association, so the attorney-client privacy privilege will always be intact. Our clients expect it.

But our clients also trust us to go beyond their expectations.

They trust our services to preserve their wealth against future litigation.

Most importantly, *they trust us.*

Protecting Your Assets is an Ongoing Need

Our dedication doesn't stop once the paperwork is signed.

That's why our annual review and flat annual fee make sense.

- ✓ Most firms charge shocking half-hour and hourly rates, but customer satisfaction isn't measured by an exact number of minutes.
- ✓ Therefore, no matter how long it takes to complete your plan or how many questions you have, we charge one flat annual fee. It's part of our commitment to quality client service.

Our **Annual Review** means we follow up on changes in your life, whether a new child, a change of residence, or anything else life brings.

- ✓ The same Asset Protection plan may not cover you ten years from now, but your need for a comprehensive safety-net will endure. We make sure your plan keeps you safe throughout the years.

Annual Fee, Ongoing Service

The Annual Fee is designed to cover the ongoing maintenance of the Asset Protection systems and strategies we have designed:

4 critical roles must be properly filled and maintained within your Asset Protection system:

Role	Filled By
Statutory Agent of your Arizona Limited Partnership	Normally filled by Lodmell & Lodmell
“Protector” of your Asset Protection Trust	Normally filled by Lodmell & Lodmell
“Foreign Agent” for your Asset Protection Trust	Normally filled by Lodmell & Lodmell
Special Successor Trustee of your Asset Protection Trust	Always filled by Southpac Trust Company

Annual Fee, Ongoing Service



Additionally, our Annual Fee provides you **direct access** to our expertise.

- ✓ Our flat fee encourages clients to call us with questions or concerns. This facilitates a higher level of communication and efficient resolution of any issues.

The annual fee is *not* simply a 'retainer' for our practice.
It's the most beneficial and effective way to serve our clients.

How Does Our Annual Fee Compare?

It's the most efficient and reasonable in the industry.

As the #1 Asset Protection Law Firm in the world, we leveraged our status to help us obtain and provide the most reasonable pricing possible. In fact, our copyrighted 2-tiered foreign jurisdiction structure is designed to minimize your annual fees and maximize your protection.

A truly comparable plan would cost **\$3,500 per year or more**. And to replace the systems we've packaged together, you would need to replace 4 separate roles:

Statutory Agent of your Arizona Limited Partnership	This is a simple role and may be completed by you if you live in Arizona, or by one of many registered agent firms in that state. Average cost is between \$150-\$450 per year if a firm is used.
"Protector" of your Asset Protection Trust	A critical role for the effectiveness of your planning, it is very important that this role be filled by an attorney intimately familiar with your Trust document and the overall area of law surrounding asset protection planning. Average cost is between \$750 - \$1,500 per year.
"Foreign Agent" for your Asset Protection Trust	There are a very limited number of possibilities for this role. Were you to contact any directly and develop a billing arrangement the average cost would be between \$1,200 - \$2,500 per year.
Special Successor Trustee of your Asset Protection Trust	This is by far the most critical and essential role in Lodmell & Lodmell's Asset Protection System, and is only available to our clients. If you were to contact any of the 5 Cook Islands Trust companies directly, the minimum annual fee is \$3,500 per year (without exception), and in many cases is upwards of \$5,000 . Additionally, none of these companies work directly with clients – all require a qualified Asset Protection Attorney to facilitate planning, almost always the attorney who drafted the Trust.

In contrast, we specifically designed our system to be the ***absolute lowest annual maintenance Asset Protection plan in existence.***

Are There Any Other Advantages to Being a Lodmell & Lodmell Client?

- 1. Asset Protection is our specialty, and it's all we focus on.** We have a tremendous amount of experience and countless reference points that have proven invaluable in helping clients through tough situations.
- 2. Years of experience means knowing all the pitfalls.** Having legal documents alone is not enough. You must have everything correct, maintain your planning properly and have expert counsel on call if you suddenly need to protect your assets.
- 3. We understand your needs!** And we have dedicated our systems, staff and resources to making sure you can *use* your planning if you ever really have to.

**It's your *wealth*, your *lifestyle* and your *freedom*.
Make sure it's protected.**

Engage

“One cannot be truly wealthy without also being free from fear.”

-Douglass Lodmell

If you have any questions about your fee, the information provided here, or your planning, please do not hesitate to call us right away.



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