



Dear Professional Advisor,

Welcome to the **Asset Protection Council™** (APC). The Asset Protection Council™ exists to support Attorneys, Financial Advisors, CPA's and other Professional Advisors who wish to guide their clients towards effective Asset Protection solutions, as well as grow their own practice around Asset Protection.

Understanding the complicated options available to protect your client's assets has become a critical component of your job as an advisor to your clients. *Clients are asking to be informed and educated about Asset Protection.* Your role as a primary advisor is greatly enhanced if you can be the source of that education.

The **Asset Protection Council™** is designed to give you tools and information needed to educate your clients in this complex area of law, including:

- 1) Understanding **Offshore** options: Offshore LLC's, Foreign Asset Protection Trust (FAPT), and when these are appropriate for your clients
- 2) Understanding the **Domestic** tools: Corporations, Limited Partnerships, LLC's, Domestic Asset Protection Trust (DAPT), other irrevocable trusts, and when these tools apply to your clients.
- 3) Understanding unique and specific tools such as the **Bridge Trust®** which combines the protection of an offshore structure with the simplicity of a domestic trust.
- 4) Understanding how any Asset Protection tool or concept fits in with your services and enhances what you are already doing.

Clients look to you for advice in this area and often obtain incomplete or incorrect information from seminars, friends, other advisors and yes – the Internet. The APC empowers you to educate your clients regarding what is real, what to avoid, what makes sense, and develop an action plan that supports their overall goals.

As a Financial Planner, CPA or other Professional Advisor, your clients are looking to you for at least 2 major things when it comes to wealth preservation:

- 1) Keep them safe from an ill-conceived plan that doesn't fit in with their current strategy, or worse, works against it.
- 2) Assist them find the right plan, right legal advice, and right strategy that protects their wealth.

Membership in the APC provides you with the resources you need to advise clients on Asset Protection. It is also gives you access to a national network of Attorneys that can support your clients in implementing an effective and ethical plan that works while respecting the planning and advice you are providing.





Becoming an Advisor Member in the APC is simple and begins with the attached application and agreement. Once this is completed and returned we will schedule a conference call with you to discuss how the APC can best serve you in your goals. Members will receive login credentials to the ATP website at www.assetprotectioncouncil.com, which will allow you access to **members-only** resources and support that includes:

- Personalized Web Page listing your profile and areas of business and expertise for access by both Members and potential clients
- Use of our proprietary client management system and data Vault
- Access to the Asset Protection video library for embedding on your website
- Asset Protection Webinars
- PowerPoint Presentations, Flyers and Brochures for branding
- Articles for printing and distribution
- Speaking Outlines
- Internal Articles posted by other members for professional consumption
- External blogging opportunities
- Access to Affiliate Partner Resources

These resources are designed to give you the best possible information about Asset Protection, as well as the Marketing and Sales support to grow your own client base.

JOIN THE ASSET PROTECTION COUNCIL™

The application process is inclusive and allows access to Attorney Affiliates and Advisor Members with a sincere desire to utilize the benefits of the Council productively. The APC seeks qualified members that meet the Professional and Ethical requirements of their profession. Experience in Asset Protection is not necessary.

➤ ***Complete, Sign and Submit the APC Application and Members Agreement Today!***

Please contact Kitty Lucarini directly at (800) 231-7112 if you have further questions or would like to discuss this program. You may also visit the Asset Protection Council™ website at www.assetprotectioncouncil.com.

In Service,

Douglass S. Lodmell, J.D., LL.M.
Managing Director of Asset Protection Council, L.L.C.





Advisor Member Agreement

This Membership Agreement is made between _____ (“Advisor Member”) and the **Asset Protection Council™** (APC). By joining the **Asset Protection Council™** the member shall have access to the full benefits of membership for non-attorneys. Affiliate agrees to the following:

1. Affiliate Member agrees to maintain the professional and ethical standards set forth by their own board, licensing or governing body. The services you provide in connection with your Affiliate with the APC will be of the highest professional and ethical standards in your industry and shall at all times meet the reasonable the professional service and quality standards associated with the APC.
2. During the time in which this agreement is in effect, the Affiliate shall be considered a Member of the **Asset Protection Council™**. An annual membership fee is required to remain a member of the APC in good standing. This affiliation and your membership in the APC may be cancelled at any time by either party with or without notice at their sole discretion. You acknowledge that APC is free to do business with whomever they please and that admission to and membership in APC is subject to APC’s sole and exclusive discretion.
3. During affiliation, the Affiliate has the express permission to use certain designated Asset Protection Council™ materials, documents, trademarks and/or copyrighted material (“Materials” and “Licensed IP” as defined in the attached Intellectual Property Licensing Agreement and Permission of Use Standards and Instructions, which is incorporated herein). Your usage of the Materials and Licensed IP are governed solely by the attached Intellectual Property Licensing Agreement and Permission of Use Standards and Instructions, which is incorporated herein.
4. No fee sharing or co-counsel relationship is allowed between Non-Attorney Members and APC or other Attorney Affiliate Members of the APC and none shall be interpreted as existing under this agreement.
5. Affiliate will not transfer or assign this Agreement, or delegate its rights or obligations hereunder, in whole or in part, whether by merger, change in control, operation of law, or otherwise, to any person or entity without the prior written consent of Licensor, such consent shall be subject to Licensor’s sole and exclusive discretion. Any purported transfer or assignment of this Agreement in breach of this Agreement shall be null and void. Subject to the foregoing, this Agreement will inure to and bind all successors and permitted assigns.





6. No other rights or duties incur as a result of this affiliation, which will last only so long as both parties continue to agree.

Advisor Member

Date

Douglass S. Lodmell J.D., LL.M.
Managing Director of Asset Protection Council, L.L.C.

Date

