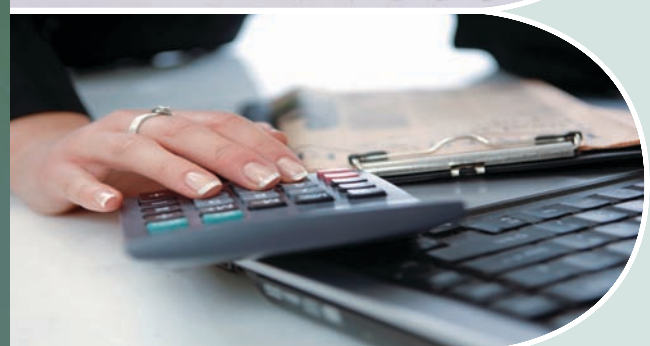
VALENTI AND ASSOCIATES
WEALTH MANAGEMENT

28411 Northwestern Hwy. I Suite 1300
Southfield, MI 48034
Phone: 248-827-1300 I Fax: 248-827-7378
www.valentiassociates.com

Value Added Educational Workshops Provided Exclusively To:

- CPA Firms
- Law Firms
- Chambers of Commerce
- Associations



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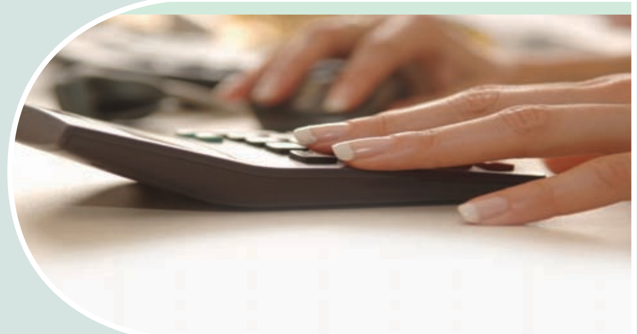

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About Valenti & Associates

It is our mission to provide quality financial guidance, to build relationships of trust, and to develop innovative solutions that will help you achieve your dreams. From retirement planning and business succession to providing for your family's future, we will find a way to move you closer to your financial goals.

Available Workshops

Survival & Increasing Business Profits
Through tax savings strategies and strategies that lower expenses in employee benefits, qualified plans and insurance products.

Life Insurance Analysis
This workshop looks at the methods and criteria that should be used to analyze an existing insurance policy and gives a framework for analyzing proposed new policies.

Corporate Retirement Plans
This workshop looks at employer sponsored plans-profit sharing, 401k, defined benefit and integrated plans. Addresses the seven key factors to consider when designing a plan.

Mistakes Made by Qualified Plan Trustees
This workshop looks at the most common mistakes and how to avoid them.

Leveraged Non-Qualified Plans
Learn how clients can selectively build their retirement nest egg, while protecting their assets.

Business Succession Planning
This workshop addresses ways to develop a smooth transition plan and structuring effective buy/sell agreements.

Key Executive Compensation
This workshop addresses how to craft a program designed to increase key employee loyalty, reduce corporate tax burdens and assure security for both the executive and the company.

Long Term Care
This workshop looks at the best strategies to protect assets in the light of the potential overwhelming cost of care.

Strategic Uses of Annuities
This workshop illustrates the strategic ways annuities can be used for tax advantaged savings and distribution, assets, allocation, placing a guaranteed income floor under equity investment results, protecting assets from creditors and providing a source of funds that guards against "living too long."

Investment Analysis
This workshop looks at the key criteria in evaluating an investment portfolio and the process for making appropriate investment decisions.

Strategic Uses of Life Insurance
Beyond protecting the income of the main wage earners, this workshop explores the other ways life insurance is strategically used in financial planning. We will explore its role in business succession, college savings, supplemental retirement income for children, charitable legacies, retirement planning, IRA distribution planning and estate\ tax management.

Financial Planning for the High Income Client
This workshop looks at the various contingencies and issues faced by high income clients and demonstrates how to do objective analysis.

College Education Funding
This workshop helps understand multiple options and how to choose the most effective option for your client.

Common Estate Planning Mistakes and How To Avoid Them
This workshop looks at nine of the most common estate planning mistakes and techniques, then provides methods to avoid them.

Asset Protection Planning with Financial Instruments
Learn the protection strategies available through the use of life insurance and annuities for the protection of your clients' accounts receivable

Developing a Financial Planning Practice
This workshop looks at the key steps that are necessary to provide value to clients in the rapidly growing area of financial planning.

Defined Benefit Plans
This workshop looks at the unique opportunities for high income clients to shelter large amounts of income.

Business Killers
This workshop looks at the 6 most common problems that will kill a business and provides guidance in avoiding them.

Family Matters
Family matters is an interactive movie that concentrates on five vitally important topics associated with growth, succession planning and exit strategies. It clearly illustrates the unique aspects of the family owned business and will help you learn how to protect and preserve your company and personal assets.

Workshop Interest Form

Please indicate your areas of interest and return to the address below.

- ☐ Survival & Increasing Business Profits
- ☐ Life Insurance Analysis
- ☐ Corporate Retirement Plans
- ☐ Mistakes Made by Qualified Plan Trustees
- ☐ Leveraged Non-Qualified Plans
- ☐ Business Succession Planning
- ☐ Key Executive Compensation
- ☐ Long Term Care
- ☐ Strategic Uses of Annuities
- ☐ Investment Analysis
- ☐ Strategic Uses of Life Insurance
- ☐ Financial Planning for the High Income Client
- ☐ College Education Planning
- ☐ Common Estate Planning Mistakes
- ☐ Asset Protection Planning with Financial Instruments
- ☐ Developing a Financial Planning Practice
- ☐ Defined Benefit Plans
- ☐ Business Killers
- ☐ Family Matters

We are always developing new workshops. Do you have an interest in an area not listed here?

Company ____________________

Name ____________________

Address ____________________

Phone ____________________