Mark Merric

From:	WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Guy Garner [ggarner1@swbell.net]
Sent:	Tuesday, October 28, 2008 9:39 AM
To:	WealthCounsel Members List
Subject:	Re: [WCMLS]Mark Merric's Graduate Tax Program Is An Educational Must

Dear WealthCounsel Colleagues:

I just got back from Mark Merric's Graduate Tax Program and I have to say it was the single most productive series of estate planning educational programs that I have ever been through in my entire legal career (I'm no spring chicken, we're talking decades, not years).

Here's Why I Say That The Course is Outstanding:
First and foremost Mark's classes tied everything I had learned in the past together in a logical, progressive sequence, with each topic such as Irrevocable Trusts and Limited Partnerships building on the other. WealthCounsel offers courses from the basic level all the way to advanced levels. So, you can take the Limited Partnership course, and the Irrevocable Trust course and learn the specifics, but how do these tools and planning concepts interrelate? That's where Mark's class is so powerful. "It brings it all together", so to speak. Mark taught us that seldom, if ever, are the estate planning tools available to us in the WealthCounsel Library used in isolation. Leverage, power, and higher fees come from using these tools together. Mark's course teaches you how to do that.

We are all blessed as WealthCounsel members with having among the WealthCounsel principals excellent teachers that are also practitioners. Mark continues that excellence by having the ability to take complex ideas and making them understandable for non-techies like me.

If you want to take your practice to the next level, and position yourself to increase your income too, take Mark's course.

Guy B. Garner, III
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1101 W. Randol Mill Rd.
Arlington, Texas 76012
Tel. 817-261-5222
Fax: 817-277-6424

Mark Merric

From:	WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Patrick B. Casey [patrick@CaseyLawOffice.com]
Sent:	Wednesday, October 29, 2008 10:11 AM
To:	WealthCounsel Members List
Subject:	Re: [WCMLS]Mark Merric's Graduate Tax Program Is An Educational Must

It is generally not my practice to participate in threads of this nature but I too just completed Marc's Bootcamp and was so impressed I feel compelled to break with protocol and chime in.

Echoing Guy and John, Marc has done the best job I've seen yet of:

1) isolating the legal technical that applies to our area of practice (if you take the course you'll quickly see that there are only a handful of seminal principles but these have been twisted and contorted into a myriad of issues that tend to distort a clear understanding and mastery of the essentials);

2) presenting the core issues in an understandable, logical, and connected fashion (there are no gaps, leaps in logic, or assumptions that you know or see what ties things together when moving from one principal or concept to the next);

3) clearing the fog created by much of what we read written by the legal/technical commentators that confounds and confuses many of us by extrapolating the core principles to the devilish detail and weaving it all into the fabric of practical application (it's like a light flashing . . . "Oh. That's what they were driving at" goes off)

John says that Marc's course is back to the basics. I only partially agree. Yes, the course exposes the basics but it does much more than that. Marc not only exposes the basics, he positions you to master them. I don't mean to suggest that sitting in his course for a week will make you an expert. Quite the contrary. Sitting through his presentations will give you exposure, understanding, and awareness. To truly master the information will require a personal effort outside of Marc's classroom. Marc gives you what you need to do this. His outlines are clear, logical, well presented, and follow the presentation. They are well researched and heavily referenced and footnoted; they're some of the best I've seen short of a legal treastise.

In summary, if you are comfortable planning estates based on "faith" (i.e. you do things because you're told that's the way it's done) Marc's program is not for you. However, if Estate Planning is the cornerstone of your practice and you wish to master the principles, understand WHY you plan like you do or WHAT certain savings and cut back clauses are in WealthDocs and WHY they're there, AND you wish to add your own creativity to your planning, this program is a must.

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Counselor & Attorney at Law

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email: patrick@caseylawoffice.com

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** John M. Preston
Sent: Tuesday, October 28, 2008 7:31 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Mark Merric's Graduate Tax Program Is An Educational Must

I couldn't agree with you more! I took Mark's course last year and it is the first reference materials I start with when I have a question. Great materials, great presentation, very well put together.

Sincerely,

John M. Preston

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john.preston@prestonestateplanning.com

-----Original Message-----
From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** Barry McKee
Sent: Monday, October 27, 2008 2:15 PM
To: WealthCounsel Members List
Subject: [WCMLS]Mark Merric's October Graduate Tax Program in Miami

This is a totally unsolicited endorsement. As usual, Merric's Miami program was terrific. I'll still be unpacking the ideas contained in his presentation months from now. I'm also going to keep his outlines on my desk as a reference tool . If he offers the program again you should all go.

Barry McKee

Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Ward Wilsey [wardwilsey@gmail.com]
Sent: Monday, May 12, 2008 2:46 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

I just got back from attending days 4 and 5. A few points:

1. It's okay if you can only make it for a couple of days. Each day stands on its own. I will be going back to the next seminar series for days 1 through 3.

2. The value of Mark's teaching can not be understated. For every part of the estate planning process you learn:
   a. The relevant law. Learning the intricate legal authority behind advanced estate planning techiques makes me really comfortable.
   b. What Mark is comfortable doing and why.
   c. What other planners are comfortable doing and why. And also why Mark thinks it may or may not work.

3. Its been said before, but it bears repeating. The comprehensiveness (assuming that's a real word) of the written materials is AMAZING. I've got a treatise like binder filled with everything I could possibly need to know about Discretionary Dynasty Trusts and Asset Protection Planning. The format is the PowerPoint slide that Mark used, which triggers a visual image from the seminar, followed by an assetion of the techniques mentioned in the slide plus relevant authority. Very good.

One question that is often raised is are Mark's courses taught based on WealthCounsel Docs. The answer is that while he discusses WealthCounsel docs at legnth, and includes sample language, we did not go question by question through drafting in WealthDocs. However, I felt that I could easily translate what I learned into WealthDocs right away. For instance, Mark raises 9 major drafting points on Discretionary Dynasty Trusts. When he was talking about them, I knew from experience exactly how to incorporate his suggestions into my drafting. More importantly from my perspective, I now know in depth the LEGAL RATIONALE behind what I'm drafting. That's the importance of classes whether Mark's or EP101, etc. You must not only learn what choices to make when drafting, but why.

All in all, very good. Highly recommended that you attend.

Regards, Ward

On 5/10/08, **Fred.Corbalis@swcglaw.com** <Fred.Corbalis@swcglaw.com> wrote:
I just attended Mark's course and must say it was not only amazingly practical but wide-ranging as well.

I'd say it was beneficial for:

(a) beginners who want to see a roadmap and clear pathway of implementing a sophisticated estate planning practice through a dynamic design system based on size of estate;
(b) intermediate level planners who want to go to the next level; and
(c) advanced planners who want to have not only a nuts and bolts review but an in depth examination of the practical issues facing practioners at higher levels.

No fluff just hard core law, design, and implementation.

Fred

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fred.corbalis@practicallawyer.com

----- Original Message -----
From: kflammia@aol.com [mailto:kflammia@aol.com]
To: Members@lists.wealthcounsel.com
Sent: Sat, 10 May 2008 07:45:49 -0400
Subject: Re: [WCMLS]Merric's Five-Day Course

As a follow up, I attended Mark's course in Orlando last fall. I was amazed how he could take such detailed subjects and break them down to a level that I could understand. Having entered estate? planning through Elder Law, I very much needed AND benefited from his five day course. I felt lucky to have him as a teacher as he is truly one of the best. (By the way, our own Lew Dymond taught the Orlando course with him and as always did a super job.

Kathleen Flammia

-----Original Message-----
From: matt.mcclintock.ls@wealthcounsel.com
To: WealthCounsel Members List <Members@lists.wealthcounsel.com>
Sent: Fri, 9 May 2008 2:48 pm
Subject: Re: [WCMLS]Merric's Five-Day Course

See the attached agenda.

?

Matthew T. McClintock, JD, Director

Continuous Improvement & Member Collaboration

matt.mcclintock@wealthcounsel.com

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From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] On Behalf Of Kimberley Fonner
Sent: Friday, May 09, 2008 1:34 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

?

Matt ? do you know where can we see an agenda for those five days?

?

--Kimberley.

?

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] On Behalf Of matt.mcclintock.ls@wealthcounsel.com
Sent: Friday, May 09, 2008 11:18 AM
To: WealthCounsel Members List
Subject: [WCMLS]Merric's Five-Day Course

?

In the ?for-what-it?s-worth? category:

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This week I attended Mark Merric?s five-day estate planning program in Las Vegas. The course is structured to allow each day to stand on its own, so folks can choose to attend any number of the courses during the week. Most attendees this week attended all five days.

?

I had heard great things about Mark?s course, but even glowing reviews don?t do the course justice. Mark?s materials are simply outstanding. The content is extremely relevant and up-to-date, and Mark takes sophisticated issues, lays them out clearly, and ties strategies together in a way that really paints the ?big picture.?

?

The course is fabulous and should be attended by anyone who wants to develop a sophisticated, well-rounded estate planning practice.

?

Matthew T. McClintock, JD, Director

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Regards,

Ward J. Wilsey

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Mark Merric

From:	WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Robert Vaksman [rvaksman@gmail.com]
Sent:	Monday, May 12, 2008 8:04 PM
To:	WealthCounsel Members List
Subject:	Re: [WCMLS]Merric's Five-Day Course

I too just attended Mark's seminar. Next time around, no excuses, YOU MUST ATTEND.

No one can argue that it's grueling to sit through 5 full days of lectures, but I would do it again, without hesitation. Simply put, the course provided some of the most THOUGHT-PROVOKING and WELL-ORGANIZED material I've ever seen or heard.

What's especially unique about Mark's approach is his seemingly easy ability to provide a bird's eye view and, without any painless transition, go deep into code and case law. Not to mention, Mark is a rock star. Who else gets such long, extended ovations after being on stage?

And, since I'm already at it, let me also thank John Preston. I've heard many (great) things about John and, as many of you, have been the recipient of his marketing prowess, through his graciously long-winded and well thought out answers to our collective marketing questions. With that said, I've looked forward to meeting the man, myth and legend for a while now. As luck would have it, as an added treat to Mark's seminar, John spoke to our group for 3.5 hours. In that (relatively) short time, it was obvious what all the fuss was about: John has the unusual ability to not only teach but, more importantly, to inspire and provide clarity of purpose.

Kudos - and thanks - to both Mark and John!

Regards,

Robert B. Vaksman, Esq., LLM (Tax) | VAKSMAN LAW OFFICES, PC

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On Fri, May 9, 2008 at 11:18 AM, <matt.mcclintock.ls@wealthcounsel.com> wrote:

In the "for-what-it's-worth" category:

Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of John M. Preston [john.preston@prestonestateplanning.com]
Sent: Monday, May 12, 2008 2:04 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

I have to agree with Matt (and all the others who attended Mark's program); this program is absolutely a must for everyone who practices estate planning to attend! There is a story about Coach Vince Lombardi that he always started every coaching session with the statement; "Gentlemen, this is a football." The reason that he did this is he didn't want anybody to miss any of the basics. Mark Merric's course reminded me of Vince Lombardi, he taught the basics and then like a good coach, he took us all the way the Super Bowl! It was a fantastic week!

Here are just a few of the specific things I liked about the course;

1.) The outline contained Mark's notes so we weren't scrambling trying to keep up with him (he covers a lot I a very short period of time).

2.) We had examples of documents to review while he explained the applicable point (it was very practical, "hands on").

3.) Even though there was a lot of information I knew, watching him explain it in such a way that I could duplicate when talking to clients or advisors was priceless.

4.) Comparing the various versions of estate planning techniques and grouping them into categories was beautifully done. This not only helps us remember all of the tools available, it helps us explain it to our clients.

5.) And the most important part, there was NO FLUFF! You know what I'm talking about, you go to a 3 or four day program and 50% or more is just filler. I hate those programs and so do all of you! There is no fluff in this program, its all "meat and potatoes" and more than you can imagine.

6.) I hate to add this one, but the program is dirt cheap, $300 for one day, $200 for each day if you take all 5! The reason why I hate to add this is Mark really should be charging more! When he comes to his senses and charges what it's really worth (10 times that), it will still be a bargain, but you'll be sorry. If I were you, I sign up before that happens.

7.) One final thought, I hate Las Vegas too (I don't drink and I don't gamble), but if I were you I would go there in heart beat to attend this program.

I could go on and on, I just thought it was great! I highly recommend this course to every estate planning attorney. This should be a required course for all estate planning attorneys! One final thought, I would recommend going to the whole program, not jumping in the middle or leaving early, I think there nuggets of gold that are passed out everyday! I was originally thinking about going to just a few days of the program. I'm glad I didn't, the whole week was well worth it!

Nice job Mark!

Sincerely,

John M. Preston

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-----Original Message-----
From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** matt.mcclintock.ls@wealthcounsel.com
Sent: Friday, May 09, 2008 11:18 AM
To: WealthCounsel Members List
Subject: [WCMLS]Merric's Five-Day Course

In the "for-what-it's-worth" category:

This week I attended Mark Merric's five-day estate planning program in Las Vegas. The course is structured to allow each day to stand on its own, so folks can choose to attend any number of the courses during the week. Most attendees this week attended all five days.

I had heard great things about Mark's course, but even glowing reviews don't do the course justice. Mark's materials are simply outstanding. The content is extremely relevant and up-to-date, and Mark takes sophisticated issues, lays them out clearly, and ties strategies together in a way that really paints the "big picture."

The course is fabulous and should be attended by anyone who wants to develop a sophisticated, well-rounded estate planning practice.

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Mark Merric

From: WealthCounsel List [Listserv@lists.wealthcounsel.com] on behalf of Rouselaw@aol.com
Sent: Tuesday, May 13, 2008 12:05 PM
To: WealthCounsel List
Subject: Re: [WCLS]Mark Merric's Seminar

Colleagues

I attended all 5 days of Mark Merric's course in Las Vegas. I had been seeking guidance in dealing with taxable estates, which I am now beginning to deal with. Mark provided a cogent road map for dealing with such clients' planning needs, as well as relevant cases and authorities supporting the positions taken. He also provided his own viewpoints as to what he does and doesn't do, and why. References to Wealthdocs were helpful, as well. I left with quite a bit of material to study, but also with a model to follow and a new found belief that, with some work and maybe "a little help from my friends," I can do this stuff. For that, I am most grateful.

I also appreciate the low cost and arrangements to keep the course affordable. Having the courses in Las Vegas is usually an economical alternative when, as here, top-end hotels are avoided. As a longtime local resident, I am sometimes amused, sometimes irritated by the occasional comments about how "awful" Las Vegas is. I have learned, however, that those with preconceived notions get what they expect, while the rest of us get to enjoy the weather, the natural surroundings, and the wide variety of food and entertainment options. See you in San Antonio.

Larry Rouse

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Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of A A Shaikh [shaikh@gmail.com]
Sent: Wednesday, May 14, 2008 11:51 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

I should comment a little more on the program. I met with an advisor today who wanted to talk about his great aunt, an 87 year old widow who needs an estate plan to deal with a $17,000,000.00 estate. The advisor thought his great aunt would be stuck with a massive estate tax and at this point in her life nothing can be done. An outline he sent me on their "strategy" was amazing. It included borrowing against real estate to pay for the expected estate tax and waiting for the 2010 repeal. They had real estate all over the place owned in general partnership with no entities of any kind.

My point in the meeting was what a hero the advisor can be. A lot of the simplified terminology I used came straight out of Mark's program. For example, how high net worth plans typicaly involve using exemptions and the time value of money. He also had specific questions on strategies he was familiar with that I was able to explain easily, again, using what I learned at the program, often lifting Mark's words from class (I probobly lifted stuff from three different seminar days in an hour long meeting). I am amazed I remember so much. I know I sounded like an expert on all things high net worth planning, without really giving away too much information, he even said that "this sounds really advanced." The advisor was excited, so was I.

I emphasized with the advisor I will not go into any strategies with the 87 year old woman (and likrly her son) when I quote the design fee, but only discuss the benefits. John Preston emphasized that during his presentation last week, and I am following that advice as well. Anyway, I don't have a client from that yet, but I can say that I will approach future (and a few current) high net worth client's differently when I do their advanced planning.

Ahmed Shaikh
Tustin, CA

On Wed, May 14, 2008 at 8:05 PM, Mark Merric <Mark@internationalcounselor.com> wrote:
Sorry, sent for your practice attachment in Word 2007. Here it is in PDF.

Respectfully,

Mark Merric

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Denver, CO 80222

Phone 303-300-0243
Fax 303-200-8867
www.InternationalCounselor.com

To ensure compliance with requirements imposed by the IRS Circular 230 , we hereby inform you that any U. S. tax advice contained in this communication

Mark Merric

From: WealthCounsel List [Listserv@lists.wealthcounsel.com] on behalf of Fred Corbalis [Fred.Corbalis@swcglaw.com]
Sent: Wednesday, May 14, 2008 9:15 AM
To: WealthCounsel List
Subject: Re: [WCLS]Mark Merric's Seminar

Excellent reference as a design and drafting guide.

Sorry to steal Mark's words but basically a series of modules that break down critical issues going from strategic (seven base modules derived from size of estate) all the way down to tactical (e.g. trust design functions and how they fit together, such as identity of trustee, standard of distribution, and removal powers).

Hate to sound like I'm puffing but I don't recall seeing such material organize the relationships between the functions that well.

Probably a function of Mark's personality—egghead meets pragmatist(!)

Fred

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Fred.Corbalis@swcglaw.com

From: "Daniel R. York" <danyorklaw@aol.com>
Reply-To: WealthCounsel List <Listserv@lists.wealthcounsel.com>
Date: Wed, 14 May 2008 10:45:57 -0400
To: WealthCounsel List <Listserv@lists.wealthcounsel.com>
Subject: Re: [WCLS]Mark Merric's Seminar

Can you comment on the quality of the written materials? Are they a good reference set?

Daniel R. York
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(714) 930-5313 Voice
(419) 735-9316 Fax

Mark Merric

From: WealthCounsel List [Listserv@lists.wealthcounsel.com] on behalf of Randall Borkus [randall@inknowvision.com]
Sent: Wednesday, May 14, 2008 9:31 AM
To: WealthCounsel List
Subject: Re: [WCLS]Mark Merric's Seminar

Phone: (888) 807-5958 Ext. 88

InKnow*Vision*

INTEGRITY, KNOWLEDGE, VISION

All,

The quality of the written materials in Mark's outline is excellent

Moreover, the detailed notes contained in the written materials are a great resource for anyone fortunate to have them

Thanks.

Randall Borkus

InKnowVision

has planned for more than 350 high net worth clients and their families.

Links

The Institute

Wealth Design

Web Casts

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Mieko Shikuma [miekoshi@aol.com]
Sent: Monday, May 12, 2008 10:57 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

I am also just back from Mark's seminar, and that was the best seminar that I have ever attended since I became a lawyer. Robert has everything that I want to say so I would not repeat what he said, but I would like to add a little bit from the perspective of a new practitioner who has been practicing estate planning for 15 months.

If you are a new practitioner, this seminar is doable. But I recommend that you attend from Day 1 if you are relatively new to the practice. Day 1 and Day 2, I think I understood all right although I have to go back to the materials and study more. I would say that my energy consumption level for each day was about 1,000 calories. Day 3, I was still doing all right until we were doing the GRAT. When we reached the point of Rolling GRAT, my energy consumption level tripled, but I was still all right, I mean I was not lost yet and I was barely surviving. Energy consumption level on Day 3 was 2,500-3,000 calories. I still survived Day 3. Day 4, my energy consumption level was not as high as Day 3. So, from Day 1 to Day 4, I thought the toughest part for me was GRAT and Rolling GRAT. Day 5 requires me to consume about 4,000 calories, and I had only 2,000 calories to consume. I was out of stamina. Right after the seminar on Day 5 around 4:45, I had to go back to the room and could not move until 8 PM. That tells how intense I was during the class. I am going to study the materials and next time, I would like to attend Day 3, 4, and 5.

Mark is a great teacher and he also has an extremely warm personality, which helped all of us go through this challenging training, especially for us beginners. With a different instructor, I probably would not have made it through the program. Also, John Preston's presentation was such an eye-opener and I am going to reorganize my whole marketing strategies. I really enjoyed this seminar, wonderful teacher and also a wonderful group of people! Usually when I go to state bar CLEs, I come home without talking to a single person, but this time I had so much fun. Thank you all. I had a really good time! :-)

Last but not the least important, I really appreciate the cost of hotel fares in Las Vegas. Being a poor beginner, I would not have made it financially if the seminar were held in NY or DC.

Best regards,

Ms. Mieko Shikuma
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www.shikumalaw.com
miekoshi@aol.com

Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Ken Robertson [kgrlawwc@gmail.com]
Sent: Monday, May 12, 2008 6:47 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

Colleagues - John & Matt hit the nail on the head. Mark put on a phenomenal course in all respects as noted. Not only that, he does it with humor and does a great job of answering everyone's questions as they come along.

As for Vegas, the strip is not my cup of tea either, but if you stay a short drive away it is a very nice city and very unlike the strip. It is also easy to get to (even from Alaska) and a relatively inexpensive place to take such a course.

Finally, this is a great refresher course on the standard EP issues/nuances and a great anti-malpractice course on the more complex aspects of estate planning.

Kudos to Mark!!! Ken.

On Mon, May 12, 2008 at 12:03 PM, John M. Preston <john.preston@prestonestateplanning.com> wrote:

I have to agree with Matt (and all the others who attended Mark's program); this program is absolutely a must for everyone who practices estate planning to attend! There is a story about Coach Vince Lombardi that he always started every coaching session with the statement; "Gentlemen, this is a football." The reason that he did this is he didn't want anybody to miss any of the basics. Mark Merric's course reminded me of Vince Lombardi, he taught the basics and then like a good coach, he took us all the way the Super Bowl! It was a fantastic week!

Here are just a few of the specific things I liked about the course;

1.) The outline contained Mark's notes so we weren't scrambling trying to keep up with him (he covers a lot I a very short period of time).

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3.) Even though there was a lot of information I knew, watching him explain it in such a way that I could duplicate when talking to clients or advisors was priceless.

4.) Comparing the various versions of estate planning techniques and grouping them into categories was beautifully done. This not only helps us remember all of the tools available, it helps us explain it to our clients.

5.) And the most important part, there was NO FLUFF! You know what I'm talking about, you go to a 3 or four day program and 50% or more is just filler. I hate those programs and so do all of you! There is no fluff in this program, its all "meat and potatoes" and more than you can imagine.

6.) I hate to add this one, but the program is dirt cheap, $300 for one day, $200 for each day if you take all 5! The reason why I hate to add this is Mark really should be charging more! When he comes to his senses and charges what it's really worth (10 times that), it will still be a bargain, but you'll be sorry. If I were you, I sign up before that happens.

Internal Revenue Code or (ii) promoting, marketing or recommending to another party any matter addressed herein.

-----Original Message-----
From: Robert Vaksman <rvaksman@gmail.com>
To: WealthCounsel Members List <Members@lists.wealthcounsel.com>
Sent: Mon, 12 May 2008 7:04 pm
Subject: Re: [WCMLS]Merric's Five-Day Course

I too just attended Mark's seminar. Next time around, no excuses, YOU MUST ATTEND.

No one can argue that it's grueling to sit through 5 full days of lectures, but I would do it again, without hesitation. Simply put, the course provided some of the most THOUGHT-PROVOKING and WELL-ORGANIZED material I've ever seen or heard.

What's especially unique about Mark's approach is his seemingly easy ability to provide a bird's eye view and, without any painless transition, go deep into code and case law. Not to mention, Mark is a rock star. Who else gets such long, extended ovations after being on stage?

And, since I'm already at it, let me also thank John Preston. I've heard many (great) things about John and, as many of you, have been the recipient of his marketing prowess, through his graciously long-winded and well thought out answers to our collective marketing questions. With that said, I've looked forward to meeting the man, myth and legend for a while now. As luck would have it, as an added treat to Mark's seminar, John spoke to our group for 3.5 hours. In that (relatively) short time, it was obvious what all the fuss was about: John has the unusual ability to not only teach but, more importantly, to inspire and provide clarity of purpose.

Kudos - and thanks - to both Mark and John!

Regards,

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On Fri, May 9, 2008 at 11:18 AM, <matt.mcclintock.ls@wealthcounsel.com> wrote:
In the "for-what-it's-worth" category:

This week I attended Mark Merric's five-day estate planning program in Las Vegas. The course is structured to allow each day to stand on its own, so folks can choose to attend any number of the courses during the week. Most attendees this week attended all five days.

I had heard great things about Mark's course, but even glowing reviews don't do the course justice. Mark's materials are simply outstanding. The content is extremely relevant and up-to-date, and Mark takes

Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Fred.Corbalis@swcglaw.com
Sent: Saturday, May 10, 2008 11:59 AM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course
Attachments: ATT00013.txt

I just attended Mark's course and must say it was not only amazingly practical but wide-ranging as well.

I'd say it was beneficial for:

(a) beginners who want to see a roadmap and clear pathway of implementing a sophisticated estate planning practice through a dynamic design system based on size of estate;
(b) intermediate level planners who want to go to the next level; and
(c) advanced planners who want to have not only a nuts and bolts review but an in depth examination of the practical issues facing practioners at higher levels.

No fluff just hard core law, design, and implementation.

Fred

Fred F. Corbalis III
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----- Original Message -----
From: kflammia@aol.com [mailto:kflammia@aol.com]
To: Members@lists.wealthcounsel.com
Sent: Sat, 10 May 2008 07:45:49 -0400
Subject: Re: [WCMLS]Merric's Five-Day Course

As a follow up, I attended Mark's course in Orlando last fall. I was amazed how he could take such detailed subjects and break them down to a level that I could understand. Having entered estate? planning through Elder Law, I very much needed AND benefited from his five day course. I felt lucky to have him as a teacher as he is truly one of the best. (By the way, our own Lew Dymond taught the Orlando course with him and as always did a super job.

Kathleen Flammia

-----Original Message-----
From: matt.mcclintock.ls@wealthcounsel.com
To: WealthCounsel Members List <Members@lists.wealthcounsel.com>
Sent: Fri, 9 May 2008 2:48 pm
Subject: Re: [WCMLS]Merric's Five-Day Course

Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of kflammia@aol.com
Sent: Saturday, May 10, 2008 5:46 AM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

As a follow up, I attended Mark's course in Orlando last fall. I was amazed how he could take such detailed subjects and break them down to a level that I could understand. Having entered estate planning through Elder Law, I very much needed AND benefited from his five day course. I felt lucky to have him as a teacher as he is truly one of the best. (By the way, our own Lew Dymond taught the Orlando course with him and as always did a super job.

Kathleen Flammia

-----Original Message-----
From: matt.mcclintock.ls@wealthcounsel.com
To: WealthCounsel Members List <Members@lists.wealthcounsel.com>
Sent: Fri, 9 May 2008 2:48 pm
Subject: Re: [WCMLS]Merric's Five-Day Course

See the attached agenda.

Matthew T. McClintock, JD, Director
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Leading Provider of Tools & Intelligence
to the Estate Planning Community

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** Kimberley Fonner
Sent: Friday, May 09, 2008 1:34 PM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Merric's Five-Day Course

Matt – do you know where can we see an agenda for those five days?

--Kimberley.

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** matt.mcclintock.ls@wealthcounsel.com
Sent: Friday, May 09, 2008 11:18 AM
To: WealthCounsel Members List
Subject: [WCMLS]Merric's Five-Day Course

Mark Merric

From:	WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of A A Shaikh [shaikh@gmail.com]
Sent:	Saturday, May 10, 2008 12:07 AM
To:	WealthCounsel Members List
Subject:	Re: [WCMLS]Merric's Five-Day Course

I just got back from the 5-day seminar as well. It was well organized and covered a spectacular amount of material. It may well be the best value in legal education I have ever seen. Four of the five days are keyed into the Wealthcounsel system, making it more useful to me then I had expected, though this is not a WC event. The materials Mark prepared (there is a binder for each of the five days) will continue to be used in my practice for years to come. I can run study groups with advisers going for years with these materials and I will look like a friggin' genius! I can add value to my own clients legal matters and will be a much better lawyer for having attended.

Mark should do it in Denver next time, the course will likely enrich you more then the Las Vegas strip will!

Ahmed Shaikh
Tustin, CA

On Fri, May 9, 2008 at 1:18 PM, <matt.mcclintock.ls@wealthcounsel.com> wrote:

Here is the link on Mark's site: http://www.internationalcounselor.com/seminars.htm

Matthew T. McClintock, JD, Director

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www.wealthcounsel.com

--Kimberley.

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** matt.mcclintock.ls@wealthcounsel.com
Sent: Friday, May 09, 2008 11:18 AM
To: WealthCounsel Members List
Subject: [WCMLS]Merric's Five-Day Course

In the "for-what-it's-worth" category:

This week I attended Mark Merric's five-day estate planning program in Las Vegas. The course is structured to allow each day to stand on its own, so folks can choose to attend any number of the courses during the week. Most attendees this week attended all five days.

I had heard great things about Mark's course, but even glowing reviews don't do the course justice. Mark's materials are simply outstanding. The content is extremely relevant and up-to-date, and Mark takes sophisticated issues, lays them out clearly, and ties strategies together in a way that really paints the "big picture."

The course is fabulous and should be attended by anyone who wants to develop a sophisticated, well-rounded estate planning practice.

Matthew T. McClintock, JD, Director

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as@ahmedshaikh.com

Mark Merric

From:	WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Henna Shah [hvshahlaw@gmail.com]
Sent:	Friday, March 28, 2008 1:11 AM
To:	WealthCounsel Members List
Subject:	Re: [WCMLS][WCLS]Mark Merric's Vegas Courses

On 3/27/08, **Henna Shah** <hvshahlaw@gmail.com> wrote:
I am jumping in on this a little late but I wanted to add my $.02. I attended Mark Merric's course in Orlando last November and was very happy that I did. I have been practicing for a number of years so I was wondering how useful/applicable the course would be for me. The first 2 days provided a very good overview for the new practitioner and, for the more seasoned, a good review of estate and gift tax principles. Starting with day 3, the course picked up speed rapidly. The modular approach to estate planning unit provides a great framework for planning larger estates, and the asset protection and high net worth planning units were also very well presented. There are a lot of planning techniques that Mark covered in detail in each of these areas that I think most practitioners would be able to implement with their clients.

I think somebody else already mentioned the usefulness (and volume) of the materials. The course is rapidfire in some places to get everything in, so it was great to turn to the materials and see things spelled out in a way that I could understand even months after having attended. Definitely plan an extra suitcase, or to have the materials shipped. There is a separate 3 ring binder for each day of the program.

Overall I would say that if you are looking for a program that is going to provide a good overview of basic estate planning, enhance your ability to serve higher net worth clients and those interested in asset protection, and provide the necessary framework for sophisticated planning, this is a solid course to attend. Mark presents very clearly and his materials are easy to follow. Feel free to contact me off list if you have any questions.

Henna

Henna V. Shah
Shah Law, LLC
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NJ: 201.343.3030
henna@shahlawllc.com
www.shahlawllc.com

From: WealthCounsel List [mailto:Listserv@lists.wealthcounsel.com] **On Behalf Of** Allen J. Margulis, JD MST
Sent: Tuesday, March 18, 2008 7:48 AM
To: WealthCounsel List
Subject: Re: [WCLS]Mark Merric's Vegas Courses

Mark Merric

From: WealthCounsel List [Listserv@lists.wealthcounsel.com] on behalf of Anita Barber [anita@abarberlaw.com]
Sent: Wednesday, March 12, 2008 10:31 AM
To: WealthCounsel List
Subject: Re: [WCLS]Mark Merric's Vegas Courses

As Mark Merric's 5-days of estate planning courses in Las Vegas approaches, I would encourage anyone who has not taken Mark's classes to attend. Several members, who attended Mark's courses in Orlando, have previously posted to the listserve. I also attended Mark's courses, and it was fantastic. As is usual with Mark, he graciously shared his expertise and taught with detail. Mark's teaches various strategies and how and when to implement these strategies with your client. His written materials are filled with superb information, to much to be completely covered in the live courses.

One of my favorite items about Mark and WealthCounsel is the depth of knowledge. No 50,000 foot fly-over. Whether you are an attorney new to estate planning or advanced in planning, Mark's courses are money very well spent.

Anita

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