

From: WealthCounsel Members List [mailto:Members@lists.wealthcounsel.com] **On Behalf Of** David Harowitz
Sent: Wednesday, April 15, 2009 11:50 AM
To: WealthCounsel Members List
Subject: Re: [WCMLS]Graduate Tax Program in Las Vegas

Jerry:

I could not agree with you more. All three presenters are good friends of, and members of Wealth Counsel. I have had the privilege of hearing all three present at different times. Mark's 5 day modular approach to estate planning seminars are the best set of seminars I have attended. It could be that the student was ready so the teacher appeared, but Mark's ability to explain the complex in such a straight forward manner allowed me to grasp the the process for using the planning tools at our disposal. Dan was an outstanding presenter when I attended his post mortem workshop a few years ago. He taught me many things I had not considered before that are part of my practice today. I will warn you that he talks funny. :-) I think his language is called "Southern" or something like that. Carl co taught me all about various business organizations, when to use each, the tax and non tax issues involved, and he made it enjoyable. Even though I attended Marks seminars in Las Vegas a year or two ago, I am trying to rearrange my schedule to attend May 11-15 if I can. From my past experience with all three presenters, I can not imagine a better investment for CLE.

On Tue, Apr 14, 2009 at 3:46 PM, Jerry Dorn <jerry@wealth-counselors.com> wrote:

Dear Colleagues:

Having recently attended courses presented by Mark Merric, I am compelled to post an unsolicited endorsement of the upcoming program in Las Vegas May 11-15. In short, Mark's program was the best five day course I have ever attended. It was packed full of sophisticated planning ideas presented in Mark's practical, modular approach. Mark's materials are amazingly detailed and include wonderful visual illustrations of the planning concepts he covers. Mark invited interaction during the presentation, and there was a lot of valuable, spirited discussion of cases and planning ideas among the group. I plan on working Mark's programs into my annual CE budget so long as he keeps offering courses. The experience and value is that good.

Although I have no personal experience with Dan Collins, I have heard from others that his post mortem planning approach and system is outstanding. I also understand that Carl Waldman will be presenting at the conference. I heard Carl speak on FLP planning two years ago, and it was among the best FLP courses I have attended. This appears to be an A-Team course offering across the board.

For those who may be interested, you can either contact me directly to discuss my recent experience at Mark's program, or you can find out more details about the upcoming courses at <http://www.internationalcounselor.com/UniversityDenverSeminar.htm>.

Respectfully,

Jerry

Gerald M. Dorn, Esq.

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., LL.M. (Tax) | VAKSMAN LAW OFFICES, PC

P 702.505.4444 / F 702.505.4593 | NEVADA

P 212.537.0111 / F 702.380.1038 | NEW YORK

robert@vaksmanlaw.com | www.vaksmanlaw.com

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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 in 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

Law Offices of John M. Preston, A.P.C.
12396 World Trade Drive
Suite 212
San Diego, CA 92128
(619) 298-7878 Phone
(858) 675-4045 Fax
john.preston@prestonestateplanning.com

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

Lawrence D. Rouse, Esq.
LAWRENCE D. ROUSE, LTD.
523 South Eighth Street
LAS VEGAS, NEVADA 89101
(702) 387-1800
rouselaw@aol.com

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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 typically 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 probably 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

Merric Law Firm, LLC
4155 E. Jewell Ave., Suite 500
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

Fred F. Corbalis III
Spierer, Woodward, Corbalis & Goldberg
707 Torrance Blvd. Suite 200
Redondo Beach CA 90277
Ph. (310) 540-3199
Fax ((310) 316-1823
Fred.Corbalis@swcglaw.com

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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
LAW OFFICE OF DANIEL R. YORK
P.O. Box 3477
Fullerton, CA 92834

(714) 930-5313 Voice
(419) 735-9316 Fax

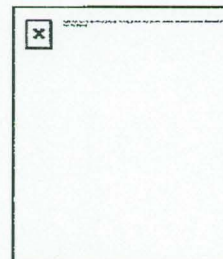
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Mark Merric

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



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

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Mark Merric

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
Shikuma Law Offices, PLLC
1833 N. 105th St suite 101
Seattle, WA 98133
206 853 1541
www.shikumalaw.com
miekoshi@aol.com

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Mark Merric

From: WealthCounsel Members List [Members@lists.wealthcounsel.com] on behalf of Ken Robertson [kgriawwc@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;

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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.
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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
Spierer, Woodward, Corbalis & Goldberg
707 Torrance Blvd. #200
Redondo Beach CA 90277
(310) 540-3199
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

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
NY: 212.796.5701
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 listserv. 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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Anita L. Barber, Esq.
Anita L. Barber, P.A.
626 West Yale Street
Orlando, FL 32804
Direct: 407-472-0595 (x154)
Fax: 407-472-0594
Email: anita@abarberlaw.com

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