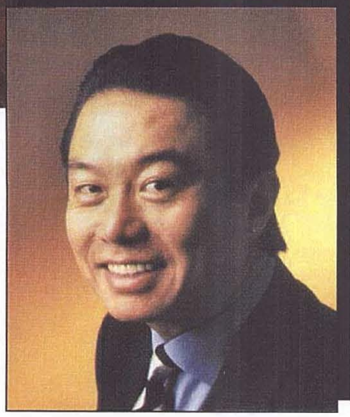

Roger Soo

Experience and Integrity

Roger Soo is a leading estate and pension advisor who has represented the financial service industry and the interests of his clients with integrity and a high degree of professionalism and skill for 30 years. Born in Shanghai, China in 1949, Roger grew up in Hong Kong and attended Diocesan Boys School. Following graduation and in keeping with family tradition, Roger moved to England where he attended The King's College Taunton, Somerset. He finished his studies in economics at Washington College in Chestertown, Maryland.

Roger specializes in assisting his clients with financial and estate planning strategies that seeks to help them accumulate assets on a tax-favored basis, reduce or eliminate income and estate taxes on those assets, and pass them on, intact, to their families and heirs.*

Thanks to innovations in technology and communication, Roger's original New York client base has expanded to a national practice, with clients from Honolulu to the East Coast.**

Our goal is to provide our clients with sound financial advice.

Comprehensive Planning

Roger's seminars are designed to show his clients some very sophisticated planning tools, but these tools cannot help achieve financial goals if they are not part of a comprehensive financial plan. Roger helps clients analyze their current situation, determine their long and short-term financial goals, and, using tools such as the concept presented today, helps clients map out a comprehensive financial plan.

If you aren't certain of what a comprehensive plan can do for you, consider the following questions:

- Do you have a retirement plan in place that utilizes sophisticated planning options and tax-reduction strategies?
- Does your estate plan both build & conserve your estate?
- Asset protection is intended to reduce the risk of asset loss resulting from future litigation, sickness, inflation, income taxes and other potentially damaging situations. Have you taken steps to protect yourself from these risks?
- Do you have adequate insurance coverage?
- Do you have a business continuation plan, and is it coordinated with your individual retirement and estate planning strategies?

To schedule an initial consultation, contact:

Roger Soo

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