

Allied Experts – Law Firms



Tim Voorhees, JD, MBA, AEP®

Managing Partner, [Matsen Voorhees Mintz LLP](#), and President [Family Office Services](#). National lecturer, trainer, and author. 36 years of experience providing wealth, estate, and charitable planning for multi-million dollar estates through national wealth planning organizations and financial service companies.

Area of expertise: Wealth Counseling and Wealth Blueprinting

- Since entering the financial planning profession in 1978, Tim has developed broad experience in estate planning and portfolio planning.
- During the 1980s, he consulted with a variety of leading investment firms to help develop investment policy statements and conducted asset allocation seminars with professors from leading graduate financial programs.
- From 1990 until the present, he has focused on zero tax and charitable planning issues of concern to individuals with estates of \$3 million or larger.

- While serving as President of Family Office Services and Managing Partner of its affiliated law firm, Tim has helped advisers plan hundreds of cases for high net worth individuals.
- Tim regularly conducts half-day "Best Practices" and "Best Tools" training sessions for attorneys, CPAs, and other advisers.

Professional affiliations

- Maryland State Bar Association
- Christian Legal Society (National Board in 1990s)
- Institute for Christian Conciliation (Certified Christian Conciliator™)
- Charter Member, Kingdom Advisors
- Accredited Estate Planner® of the NAEPC

Education

- JD - Southern Methodist University - Corporate & Estate Planning Law
- MBA - Arizona State University - Finance & Accounting, Academic Scholarship
- BA - Macalester College – Economics, National Merit Scholarship

Charitable Organization Leadership Roles

- Board Leader, Crown Financial Ministries, Southern California & Hawaii, 2008-2010
- Board Member, Christian Legal Society national board, 1990s
- Board Member, Faith and Work Life national board, 2008-2010
- Member, Grace Church, Laguna Niguel 2004-present (Serve in various roles)
- Member, Presbyterian Church in America, 1992-2004 (Served in various teaching and leadership roles)

Personal

Tim lives with his wife, Darci, and their sons in Mission Viejo, CA.