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Jeff Matsen

AN ATTORNEY FOR ALL SEASONS

An Attorney for ALL SEASONS



Jeff Matsen has spent 5 decades protecting wealth, assets and family legacies for high net worth families throughout California and across the globe

by Jennifer Hadley

“F

amily means everything to me. It is one of the main reasons I chose to specialize in protecting families and their legacies,” says Jeff Matsen, founding partner of Matsen Voorhees Mintz LLP, and one of *Worth Magazine’s* Top 100 Attorneys.

Continuing he says, “My wife Susan and I are blessed to have seven children and 17 grandchildren. I am very proud of the time and effort my wife and I have spent to develop and build up the strong family foundation and unity we enjoy. I have won several professional awards, but the award that I treasure most was being designated as the ‘Orange County Father of the Year’ in 2007. In actuality however, the award should have gone to my wife. Our children are all best friends and have married individuals with like values and lifestyles. I am so fortunate to have such a wonderful family with an amazing wife and well-adjusted, happy and responsible adult children.”

Indeed Matsen’s love of family pushed him to want to help other families protect all that they had worked for over the years. “I decided I wanted to focus my talents in the estate planning field because I really like helping people preserve, protect and increase their assets and I enjoy developing strategies and techniques for passing on their legacy to their families,” he adds.

A TIME TO SOW

Yet, before Matsen even became a father and grandfather, he was developing life skills that would eventually help to make him so relatable to clients. Beginning with a Mormon mission to Brazil in his early twenties, “At a time when most guys were

thinking of girls, cars and school, I was spending time thinking about how to help other people,” he recalls. In fact, it was this desire to help others that helped steer him in the direction of transactional work, rather than the more adversarial fields of law such as litigation. “My father was a CPA, and my uncles were all businessmen. So business and finances kind of ran in the family,” he says.

After completing his mission work, and undergraduate degree, Jeff says, “I was fortunate enough to graduate from UCLA Law School with honors and was recruited by several of the leading LA area based law firms. I chose one of these firms because of its business, tax and estate planning background,” he recalls. Yet a previous commitment to the United States Marine Corps would force him to temporarily change course, and take a leave of absence, something that turned out to be a great benefit to him professionally and personally.

“I had to go to Officer Candidate School and later spent six months in Basic School in Quantico, Virginia. Thereafter, I attended the Naval Military Justice School, and finished up the remainder of my three year tour of duty at the El Toro Marine Base in Orange County. I started out as defense counsel and won my first case, and was made the Chief Prosecutor. Because of the buildup brought about by the war in Vietnam, I finished up my tour of duty as the Military Judge for the Marine Base, a job usually handled by a Colonel, whereas I was still a young Captain,” Matsen says.

During his tenure as a Judge Advocate, Matsen capitalized on an opportunity to moonlight as a teacher at Western State University College of Law, an experience he recalls fondly. Not





Matsen Voorhees Mintz partners, Tim, Jonathan, Jeff and Of Counsel, Brad Erdosi

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only did he like teaching estate and business planning, but he enjoyed the process of writing his own materials for the course. Ultimately, Matsen would wind up spending 15 years teaching law school at night.

In the meantime, Matsen would begin the journey of fatherhood. Early on in his experience, he realized the value of hands on involvement with his children. His love of sports and working with youth propelled him into a twenty three-year “career” of coaching Little and Pony League Baseball and Youth Club Basketball. “I absolutely love coaching,” Matsen says “and it paid off in huge dividends with the fantastic relationships I have with my children and their friends. I tried to spend individual time with each of my kids and I am so blessed to have the special affinity I have with each of them. Even now, although they have their own busy lives and activities, we stay in constant contact. My wife is my best friend and my children come next. Family means everything to me. I am totally invested in my family.”

NURTURING RELATIONSHIPS

Matsen’s own experience in building relationships on his Brazilian mission, in the Marine Corps, as a teacher and coach had conclusively shown him that in his line of work, relationships were worth their weight in gold. This idea was reinforced by one of the many “good people I’ve been fortunate to surround myself with, over the years,” says Matsen. In fact, he believes that the best advice he ever received as a young attorney was to “Invest time in developing personal relationships not only with clients but also with colleagues and referring partners,” he says. Today, Matsen

shares that same advice with the young attorneys he mentors and co-counsels with. “I always tell estate planning attorneys that the most important thing they need to do is to understand the importance of personal relationships and the efforts that must be made to invest in building such relationships.”

For the next several decades, Matsen would work primarily as a solo practitioner, developing a reputation as the go-to attorney for high net worth individuals needing to set up and form corporations, limited liability companies and partnerships of all types. He would provide ongoing business, tax and legal advice, including strategic planning and executive coaching. He would prepare living trusts, wills and other related estate planning documents, as well as do probate and trust administration and the preparation of estate tax returns and necessary accompanying documentation.

As a result, his knowledge of international law and asset protection became highly coveted, and he developed a niche practice serving professionals including physicians, attorneys, professional consultants, business owners and executives, and real estate investors. In one case, Matsen’s work in winning a case against the IRS before the US Tax Court had been documented in *Time* magazine, only adding to his recognition as an expert in the field.

Not surprisingly, Matsen’s skills and the rave reviews of his clients and peers began resulting in awards including a “10/10 Superb” rating by Avvo, and an AV-Preeminent rating by Martindale-Hubbell. He’s been named a “Super Lawyer” by *Los Angeles Magazine* in addition to being named a “Top Attorney” by *OC Metro* magazine. Matsen has also been rated by *US News* and *World Report* as one of the best tax planning attorneys in

the country. Yet by 2000, Matsen was ready to up his game even more.

CULTIVATING BEST BUSINESS PRACTICES

With a place secured amongst the world's top experts in his field, Matsen decided to capitalize on his standing by taking stock of his own business practices. "I'm not a numbers guy. I'm a big picture guy," says Matsen. To that end when looking at the big picture of his own career he saw that he was ready to take his business to a new level. "My kids were grown up, and Susan and I were empty nesters. I had a vision of where I wanted to be, and I decided to take it up a level."

Matsen began by focusing on fortifying his brand, and implemented a four step strategy to increase his personal brand awareness, outside of his existing network. "I built up a strong online presence, recognizing that the internet was going to be the route that many people would take to find estate planning attorneys. I saw it wasn't just a trend, people of all ages were going to search the web," he says.

He also increased the number of continuing educational seminars he participated in. "This gave me the incentive to write material, and attendees wanted it. I started getting more referrals, and began doing more local seminars, and national seminars via television or the web," he says.

Matsen also attributes his membership in WealthCounsel® as instrumental in helping take his practice to greater heights.

"WealthCounsel® produces its own software, provides practice building information, and offers opportunities for more seminars. I became more well-known through my membership," he explains. Finally he says, he worked on strengthening his relationships even more. "I have a very diverse background, and people can relate to me as a former Marine, teacher, coach and mostly as a father and grandfather. People who have great wealth are very concerned about protecting it for their children and grandchildren," he adds.

As far as protecting that wealth is concerned, no one is better versed in the field of asset protection planning than Matsen. In 2012 he published the book *The Ladder of Success: An Estate Planning Primer*. The book went on to win the 2012 Elite Awards Gold Medal in the Finance/Investment Economics field, and the ABA took notice. As the result, later this year an updated and revised version of the book titled *The ABA Consumer Guide on Asset Protection Planning* will be released through the American Bar Association.

REAPING THE FRUITS OF HIS LABOR

By 2012, Jeff Matsen's career was at an all-time high, but he saw an opportunity to further secure his position as one of the top estate planning attorneys in the nation. This came in the form of establishing a new firm with partners Tim Voorhees and Jonathan Mintz. "In January of 2012, I was fortunate enough to combine my practice with that of Tim Voorhees, a nationally recognized estate and tax planning attorney. Tim has written books, given



Jeff and Susan with their children and grandchildren

seminars and training courses on a national level, and provided wealth, estate and charitable planning for multimillion dollar estates for over 35 years,” Matsen says proudly.

By 2013, the two had also attracted Jonathan Mintz, who had been serving as Chief Operating Officer of WealthCounsel®, overseeing the operations of the nation’s premier estate and business planning attorney membership throughout the United States. “Because of his passion for helping professionals collaborate, Jonathan was also instrumental in the creation of the Adviser’s Forum, a national multi-disciplinary membership organization that helps all disciplines of wealth planning professionals work together more productively for the benefit of their clients,” Matsen says. “We were excited to affiliate with him.”

With that, Matsen Voorhees Mintz LLP was born, and since that time, Matsen says the partners have continued to look for ways to grow while maintaining the premium level of service their clients have come to expect. “Our firm has a unique and highly organized method of processing and tracking our services so that we can keep our clients informed and measure the progress we make on each different case matter. Our processing methods are truly innovative, but what might be most different about our firm is the ability we have to integrate cutting edge strategies along with time tested concepts to benefit our clients in the areas of estate, asset, business and income tax planning,” Matsen says.

By way of example, he reports that the firm has realized great success in implementing domestic and/or offshore asset protection modular structures utilizing asset protection trusts and limited liability companies. Another tactic that has earned Matsen Voorhees Mintz LLP the respect of referring attorneys and clients is the way they are able to take advantage of strategies which allow clients to transfer wealth to their children and grandchildren in an estate tax saving manner.

Clearly, Matsen’s dedication to grow himself and his firm has paid off, and the last thing on his mind is slowing down. Even with decades of success under his belt and international recognition for his expertise, Matsen sees no end to his work. “I have a lot of energy and I have always worked hard. Our firm is growing and will continue to grow over the next several years. Tim and Jonathan, my partners, and our “Of Counsel” Attorney Bradley Erdosi, and the rest of our staff are all extremely competent and driven for success. Matsen Voorhees Mintz will continue to grow and be a major force in the estate planning area for years to come,” he says. ■

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EXPERIENCE



» **EDUCATION**

- Brigham Young University, B.A., cum laude, 1964
- University of California at Los Angeles, J.D., with honors, 1967

» **ADMITTED**

- 1968, California and U.S. District Court, Central District of California
- 1972, U.S. Tax Court
- 1974, District of Columbia and U.S. Supreme Court

» **MEMBERSHIPS**

- State Bar of California; American Bar Association (Member, Real Property, Probate and Trusts Sections)

» **MILITARY**

- Capt., USMCR, 1968-1971

» **AWARDS & DESIGNATIONS**

Jeff has been designated by Worth magazine as one of “America’s Top 100 Attorneys,” by *Los Angeles Magazine* as one of California’s “Super Lawyers” and by *OC Metro* magazine as one of “O.C.’s Top Lawyers.” The Nationally Renowned Attorney Rating Service, ‘AVVO’ has rated Jeff a perfect “10/10 Superb.” An award winning author of the book, *The Ladder of Success: An Estate Planning Primer*. He has continued to achieve the highest “AV rating” and has been designated a “Preeminent Lawyer” by the only other prestigious attorney rating directory, Martindale-Hubbell. In addition, Jeff is a member of Orange County’s Center Club, the President’s Business Advisory Council and the Board of Counselors of the Orange County Symphony Orchestra. Furthermore, the Father’s Day Council of Orange County and the American Diabetes Association honored Jeff as the “Orange County, California 2007 Father of the Year.”

» **LANGUAGES**

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