ESTATE PLANNING
PROFESSIONALS

EPP Balanced Growth Model

April 30, 2010 Monthly Review

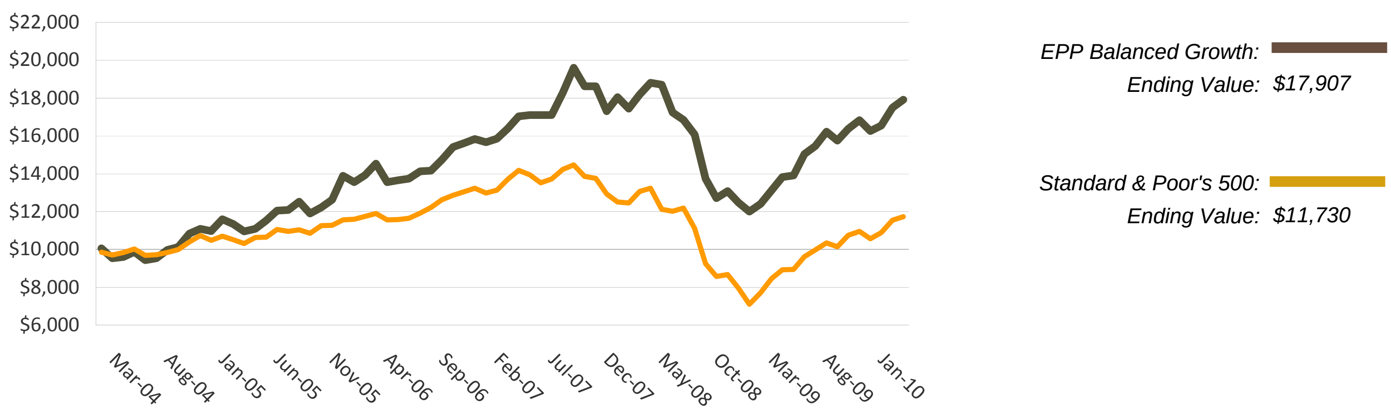
Strategy Overview

The Estate Planning Professionals Aggressive Growth Model employs a quantitative and systematic process that exposes the underlying model holdings to the best recent performing sectors and individual mutual funds. The foundation of our quantitative approach relies on relative strength, while adjusting for a fund's unique volatility. Positions are held until a specific fund's quantitative rank falls below a proprietary threshold. Once a fund meets the selling criteria the fund is then replaced with the highest ranking option available. Holdings are systematically added and sold twice a month, allowing the model to continually adjust to changes in the market.

Performance

	YTD	1 Month	3 Month	6 Month	9 Month	1 Year	2 Year	3 Year	4 Year	5 Year	10 Year	SI
EPP Balanced Growth	6.41%	2.43%	9.31%	13.67%	19.11%	36.53%	-0.74%	3.00%	5.35%	10.34%	-	9.91%
Standard & Poor's 500	7.05%	1.58%	9.11%	15.66%	21.99%	38.83%	-5.24%	-5.05%	-0.35%	2.62%	-	2.62%

Growth of a $10,000 Investment Since Inception



Rolling Period Performance

(Not Annualized)

	1 Month	3 Month	6 Month	9 Month	1 Year	2 Year	3 Year	4 Year	5 Year
# of periods	74	72	69	66	63	51	39	27	15
Best	10.05%	16.81%	30.84%	36.60%	41.01%	64.81%	93.66%	98.33%	63.56%
Worst	-14.56%	-24.57%	-32.43%	-36.24%	-33.57%	-23.48%	-11.54%	5.77%	19.92%
Average	0.89%	2.73%	5.81%	8.88%	11.13%	20.08%	34.81%	38.75%	47.85%
% Profitable	66%	69%	78%	82%	79%	65%	90%	100%	100%

Risk/Volatility

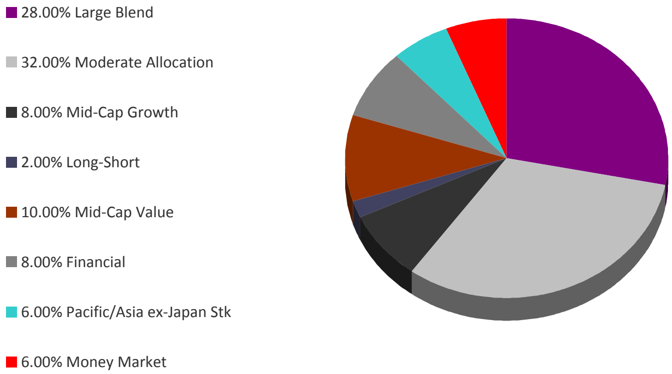
	Beta (S&P 500)			Annualized Std. Dev.		
	3 Year	5 Year	SI	3 Year	5 Year	SI
EPP Balanced Growth	0.72	0.75	0.79	18.49%	17.37%	16.66%
Standard & Poor's 500	-	-	-	19.83%	16.99%	15.63%

Monthly Performance

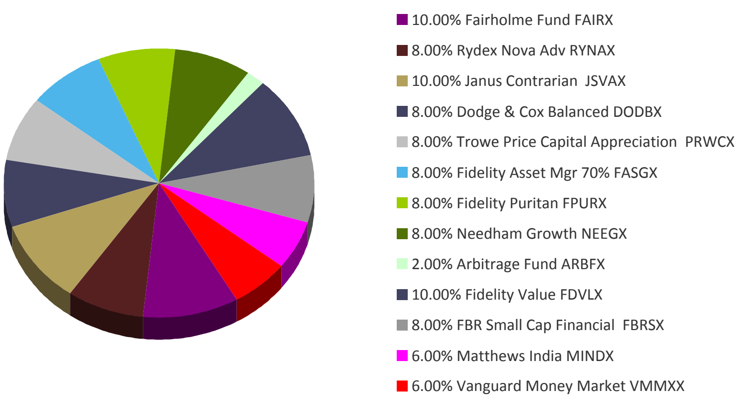
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual EWC BG	Annual S&P 500
2010	-3.41%	1.76%	5.70%	2.43%	-	-	-	-	-	-	-	-	6.41%	7.05%
2009	-4.72%	-3.81%	3.39%	5.79%	5.42%	0.53%	8.14%	2.83%	4.93%	-2.90%	3.99%	2.73%	28.61%	26.45%
2008	-7.00%	4.29%	-3.42%	4.24%	3.49%	-0.51%	-7.85%	-2.30%	-4.56%	-14.56%	-7.49%	2.97%	-29.70%	-37.01%
2007	1.48%	-1.05%	1.15%	3.40%	3.97%	0.36%	-0.02%	-0.04%	6.93%	7.21%	-5.01%	0.00%	19.26%	5.50%
2006	10.05%	-2.39%	2.75%	4.37%	-6.83%	0.82%	0.66%	2.72%	0.34%	4.06%	4.55%	1.26%	23.66%	15.76%
2005	-1.12%	5.66%	-2.18%	-3.43%	1.23%	4.03%	4.51%	0.25%	3.70%	-5.09%	2.80%	3.26%	13.76%	4.91%
2004	-	-	0.49%	-5.19%	0.75%	2.82%	-4.41%	0.95%	4.59%	1.56%	7.01%	2.46%	10.93%	7.38%

EPP Balanced Growth

Current Asset Allocation



Current Fund Allocation



"The highest compliment I can ever receive is a referral from my clients and friends."

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Meet Michael Valley -
Michael founded Estate Planning Professionals in 1991 after spending a decade in the financial services business. He and his staff are known for bringing their dedication and expertise to each client's unique situation - with the combined experience to provide all aspects of Estate and Life Planning. For Michael and his team, the client always comes first.

Over the years, Michael has become a well-known and highly regarded financial advisor and national speaker. He assists clients in preserving their capital, increasing their income and more profitably organizing their investments. Michael has advised retirees from Lucent Technologies, Dupont, General Motors, Battelle, Abbott Labs, RCA, Kenworth, Nationwide Insurance, as well as state and federal employees.

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