



ESTATE PLANNING
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EPP Growth Model

April 30, 2010 Monthly Review

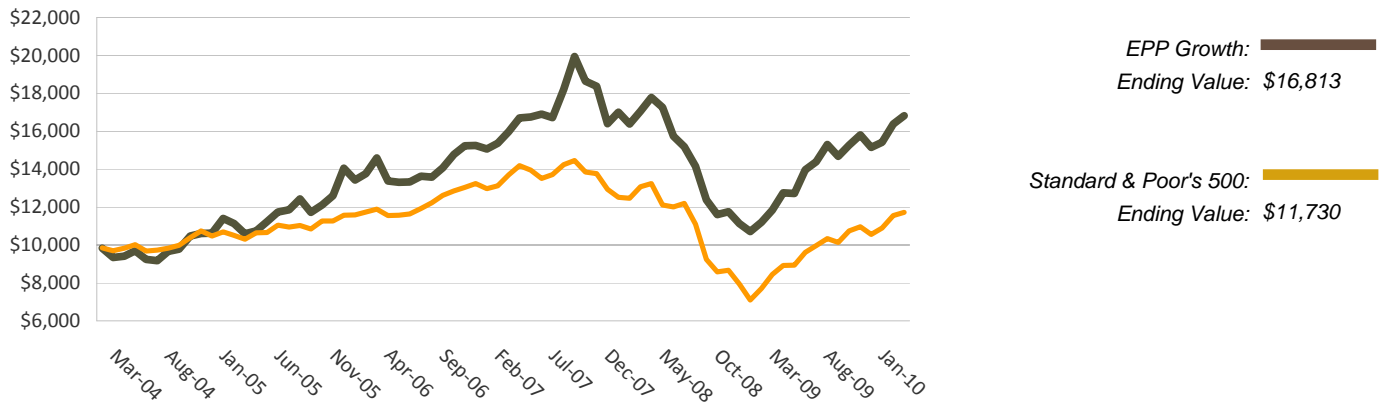
Strategy Overview

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 Growth	6.35%	2.66%	10.14%	14.58%	20.38%	41.96%	-0.70%	1.70%	3.60%	9.67%	-	8.79%
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	11.49%	20.28%	36.65%	42.51%	46.32%	70.21%	103.93%	86.63%	58.67%
Worst	-12.50%	-23.60%	-34.76%	-39.75%	-37.92%	-28.90%	-20.77%	-3.71%	7.12%
Average	0.83%	2.62%	5.61%	8.67%	10.82%	17.28%	30.75%	30.55%	40.65%
% Profitable	62%	68%	71%	79%	78%	63%	77%	93%	100%

Risk/Volatility

Beta (S&P 500)

Annualized Std. Dev.

	Beta (S&P 500)			Annualized Std. Dev.		
	3 Year	5 Year	SI	3 Year	5 Year	SI
EPP Growth	0.79	0.83	0.87	20.85%	19.96%	19.00%
Standard & Poor's 500	-	-	-	19.83%	16.99%	15.63%

Monthly Performance

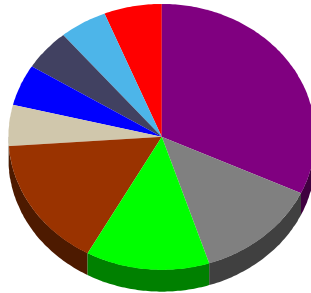
Annual

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	EWC G	S&P 500
	2010	2009	2008	2007	2006	2005	2004							
2010	-4.14%	1.71%	6.25%	2.66%	-	-	-	-	-	-	-	-	6.35%	7.05%
2009	-5.29%	-3.73%	4.48%	5.82%	7.70%	-0.32%	9.84%	3.06%	6.25%	-4.06%	4.04%	3.56%	34.55%	26.45%
2008	-10.74%	3.71%	-3.66%	4.05%	4.29%	-2.98%	-8.79%	-3.50%	-6.85%	-12.50%	-6.27%	1.28%	-36.06%	-37.01%
2007	0.12%	-1.15%	1.95%	4.06%	4.49%	0.33%	0.85%	-1.07%	8.92%	9.49%	-6.49%	-1.45%	20.69%	5.50%
2006	11.49%	-4.39%	2.51%	6.03%	-8.30%	-0.58%	0.13%	2.32%	-0.37%	3.55%	5.03%	3.07%	20.85%	15.76%
2005	0.01%	7.36%	-2.40%	-4.75%	1.40%	4.60%	4.41%	1.03%	4.81%	-5.73%	3.38%	4.03%	18.67%	4.91%
2004	-	-	-1.73%	-5.02%	0.72%	3.18%	-4.70%	-0.72%	5.26%	1.22%	7.07%	1.41%	0.72%	7.38%

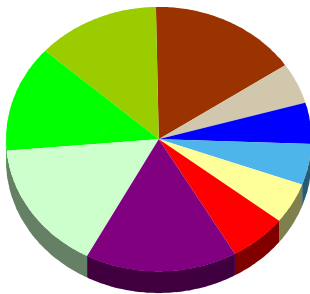
EPP Growth Model

Current Asset Allocation

- 32.00% Large Blend
- 13.00% Financial
- 13.00% Mid-Cap Growth
- 16.00% Mid-Cap Blend
- 5.00% Miscellaneous
- 5.00% Pacific/Asia ex-Japan Stk
- 5.00% Technology
- 5.00% Real Estate
- 6.00% Money Market



Current Fund Allocation



- 16.00% Fairholme Fund FAIRX
- 16.00% Janus Contrarian YACKX
- 13.00% FBR Small Cap Financial POGSX
- 13.00% Rydex Nova Adv RYNAX
- 16.00% Fidelity Value FDVLX
- 5.00% Fidelity Sel. Auto FSAVX
- 5.00% Matthews India MINDX
- 5.00% Fidelity Select Electronics FSELX
- 5.00% Cohen & Steers Realty Shares CSRSX
- 6.00% Vanguard Money Market VMMXX

"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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