

**Tim Voorhees
Guy Baker
Julie D. Kasner**

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FORM ADV PART 2B. BROCHURE SUPPLEMENT

This brochure supplement provides information about Tim Voorhees, Guy Baker, and Julie D. Kasner that supplements the Tax Efficient Asset Management Solution, Inc. Brochure. You should have received a copy of that brochure. Please contact Tim Voorhees, President and Chief Compliance Officer if you did not receive the firm's brochure or if you have any questions about the contents of this supplement.

Additional information about the above individuals is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Tim Voorhees

Date of Birth: January 26, 1959

Employment:

Family Office Services, Inc., Jan. 2006-Present

TEAMS, Inc., June 2008-Present

Matsen Voorhees Mintz LLP – Dec. 2011 – Present

Voorhees Intellectual Property, LLC, Dec. 2008 – Present

Wealth Counselor Network, Jan. 2002 - Present

Copenbarger & Voorhees LLP 2009 – November 30, 2011

Million Voorhees, LLP, 2007-2009

Securities Equity Group, Aliso Viejo, CA, Registered Representative, July 2007- Dec. 2007

The Wealth Design Center, July 1998-Jan. 2002

ValMark Advisers, Aug 2002-Sept. 2003

Brown & Streza LLP, 2003-2007

Licenses/Registrations/Credentials:

AEP – **Honorary Designation 2011**

Education:

Juris Doctorate, Southern Methodist University; Dallas, TX; May 1994. Concentration in corporate and estate planning law.

Master of Business Administration, Arizona State University; Tempe, AZ; Spring, 1985.

Specialization in Finance and Accounting. Significant awards: Arizona State graduate tuition scholarship, Beta Gamma Sigma membership (awarded to M.B.A. students with the highest grade point averages).

Bachelor of Arts, Macalester College; St. Paul, MN; December, 1981. Major in Economics. Significant awards: Macalester Dewitte Wallace National Merit Scholarship, Lowell Thomas public speaking scholarship.

Baccalaureate, Colombo Britanico and Nuestra Señora de Pilar, Cali, Colombia, South America.

Guy Baker

Date of Birth: April 16, 1945

Employment

TEAMS, Inc., Investment Advisory Representative – 01/2010-present

Alexander Beard (USA), LLC – Managing Member – 01/12 – Present

Family Wealth Counselors, LLC, Newport Beach ,CA, Managing Director 8/97 - Present

Baker Mountford Insurance Services, Newport Beach, CA, President 1/97 – Present

BMI Consulting, LLC, Newport Beach, CA, Managing Director 9/96 – Present

Baker Jensen Investment Advisors, LLC – Managing Member – 06/95 – Present

BTA Advisory Group, Newport Beach, CA, Agent 1/93 – Present
Associates in Insurance Concepts, Newport Beach, CA, Owner 8/79 – Present
Bennett Ross – Houston, TX - Registered Representative - 3/11 – 08/2012
Independent Financial Group – San Diego, CA - Registered Representative - 6/10 – 3/11
National Planning Corporation – Los Angeles, CA Registered Representative 3/10 – 6/10
Main Street Securities, LLC, Hays, KS, Registered Representative 7/00 – 3/10
Westport Financial Services, LLC, Westport CT, Registered Rep. 5/97 – 7/00
Baker Jensen Investment Advisors, LLC, Newport Beach, CA, Managing Director 6/95 – 11/10
Baker Thomsen, Newport Beach, CA, Co-owner 2/86 – 12/08

Credentials and Licenses

CFP - 1983

CLU - 1972

ChFC - 1982

AEP – **Honorary Designation 2006**

California Insurance License

Education

Bachelor of Science, Economics – Claremont McKenna College 1963-1967

Masters in Business Administration – University of Southern California 1967-1968

Masters in Financial Service – American College Bryn Mawr - 1984

Masters in Management – American College, Bryn Mawr – 1986

Julie D. Kasner

Date of Birth: December 14, 1954

Employment

Family Office Services, Inc., July 2006 – Present

TEAMS, Inc., 2010-present

DJR Enterprises, Inc. March 1990 – June 2006

Holley Escrow, Inc. June 1975 – December 1978

Credentials and Licenses

CFP® 2010

California Insurance License – Life

Education

Bachelor of Science, Business Administration, Grand Canyon University. Phoenix, AZ. Spring 2010. Specialization in Management. Significant awards: Grand Canyon University Academic Scholars Program, Pi Beta chapter of ASL honor society.

CFP Coursework, The American College, Bryn Mawr, PA. 2007-2009.

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial

planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Your Chartered Life Underwriter® has earned the premier credential in the insurance profession, representing eight or more comprehensive college-level courses covering all aspects of insurance planning, estate and retirement issues, taxation, business insurance, and risk management. For more than 80 years consumers have trusted this mark, which is conferred by The American College, a non-profit educator with the highest level of accreditation.

The average study time for the program is over 400 hours and can take years to earn. Each CLU® must also complete a minimum of 30 hours of continuing education every two years and meet extensive experience requirements, ensuring the knowledge you’re counting on is both comprehensive and current.

Your Chartered Financial Consultant® has completed the most extensive educational program required

for any financial services credential. Each ChFC® has taken eight or more college-level courses on all aspects of financial planning from The American College, a non-profit educator with the highest level of academic accreditation.

The average study time for the program is over 400 hours, and advisors frequently spend years earning this coveted distinction. Each ChFC® must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that you get the professional financial advice you need.

Accredited Estate Planner® -(AEP)- A graduate level specializing in estate planning obtained in addition to already recognized professional credentials within the various disciplines of estate planning. Awarded by the NAEPC. There is a credential requirement, a professional discipline requirement engaged in estate planning requirement and an experience requirement as well as an educational requirement.

Item 3 - Disciplinary Information

None.

Item 4 - Other Business Activities

Mr. Voorhees is the managing partner of Matsen Voorhees Mintz LLP, where he spends approximately 70% of his time.

Mr. Voorhees is a member of the Maryland Bar and does not practice law within the state of California.

Mr. Voorhees is managing member of Voorhees Intellectual Property, LLC and spends less than 1% of his time on this activity.

These activities create a conflict of interest.

Item 5 - Additional Compensation

Members of TEAMS do not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through TEAMS.

Item 6 - Supervision

Mr. Voorhees, as chief compliance officer of the firm, supervises the activities of all supervised persons. Mr. Guy Baker supervises the activities of Mr. Voorhees.

Item 7 - Requirements for State-Registered Advisers

1. Mr. Voorhees, Mr. Baker, and Ms. Kasner have NOT been involved in any of the events listed below.
 - a. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
 - b. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
2. Mr. Voorhees, Mr. Baker, and Ms. Kasner have NOT been the subject of a bankruptcy petition at any time.