

Are you Un-Protected?

If you have assets, or savings. If you are concerned about finances for your parents or children. If you are thinking about retirement. If you have a small business. If you are concerned about value of the dollar or real estate values. If you are aware that anyone can steal your identity or show up unannounced at your home....

Solutions are explained that can provide privacy, and protect your family from financial attack. You can almost completely eliminate losses from medical bills, lawsuits, real estate losses, identity theft, and mistakes of your relatives. Sometimes there are tax savings too.

Learn how to Privately own
and Privately protect....

-your home
-your business
-your bank accounts
-your stock
-your retirement
-your vehicles
-your collectables

You can recover your privacy and protect your family

For ourselves, our staff, our families, and our friends.

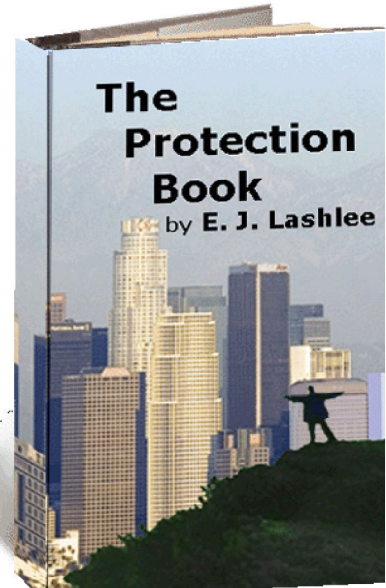
Email at **truetrust@gmail.com**

or

Phone: **(949) 497-3600**

10am to 10pm – 7 days a week

Read some of the book at: www.TheProtectionBook.com



REASONS AND TYPES OF TRUSTS

Manage Assets
Protect Children, Grandchildren, Spouse, Parents, Friends
Protect from child's future wife or husband
Protect Business
Protect from loss of income, house, or medical bills
Provide for School, Health, Security, and Educational
Provide for unable persons, for minors until of age
Provide for minors until educated, until marries, until mature, or to have kids
Protect from potential FUTURE debts or taxes, or those of relatives and friends
Provide management of income to restricted persons that cannot earn income
Protect from child's (or parent's) mistakes or legal entanglements or divorces
Protect for retirement, medical benefits, insurance, or government benefits
Provide for tax savings or shift taxes to lower income brackets
Unlock Portfolio into Separate Protected Assets that are not guaranteeing each other
Eliminate corporation, partnership, or LLC expense, registration, reporting, errors, and penalties
Eliminate costs, fees, confusion, disagreements, transfers delays, and attacks on the estate at death
Eliminate probate and death taxes



COMMON TYPES OF TRUSTS - (Many purposes can be combined in most type of trusts, but are often overlooked)

Private Asset Trust (PAT)	Trust by Statute	Seniors Residence Trust
Living Revocable Trust (LRT)	Trusts created by a court	GRIT Trust
Real Estate Investment Trust (REIT)	Trusts created by a contract	Trust by Will
Family Limited Trust	Trusts created by an event	Settlor Trust
Personal Residence Trust	Simple Trust	Stock Holding Trust
Complex Trust	Living Trust	Creator Trust
Family Trust	Passive Trust	Grantor Trust
Blind Trust	Crummey Trust	Insurance Trust
Business Trust	Intervivos Trust	Land Trust
Verbal Trust	Illinois Land Trust	Revocable or Irrevocable Trust
Deed of Trust	Massachusetts Trust	Generation Skipping Trust
A/B Trust	Spendthrift Trust	Trust Deed
A/B/C Trust	Special POA Trust	Investment Trust
Banking Trust	Corporate Trust	Pourover Trust
Children's Trust	Legacy Trust	Anti-stalking Trust
Public Trust	Charitable Remainder Trust	Foreign Trust
Charitable Trust	Uni-Trust	Custom Trust
Court Trust	Church Trust	Q-TIP Trust
Prenuptial Trust	Constitutional Trust	Privacy Trust
Pet Care Trust	Special Needs Trust	Companion Trust
Charter Trust	Foundation Trust	Contract of Trust
Remainder Trust	Discretionary Trust	Non-Grantor Trust
Testamentary Trust	Education Trust	Investment Trust
Asset Protection Trust	International Trust	Miller Trust
GRAT Trust	Offshore Trust	Private Asset Protection Trust

CELEBRITIES & FAMOUS PEOPLE

Divorces and Litigation without Private Asset Protection Trusts

PROTECTION FAILURES

1. James Cameron and Linda Hamilton..... she got \$50 million
2. Phil Collins third wife Orriane..... got \$50 million (2nd wife got \$34 million)
3. Morgan Freeman and Myrna Freeman..... she got \$400 million
4. Michael Douglas and Diandra Douglas..... she got \$45 million
5. Kenny Rogers and Marianne..... she got \$160 million
6. Harrison Ford and Screenwriter Melissa Matheson... she got \$90 million
7. Steven Spielberg and Actress Amy Irving..... she got \$100 million
8. Mick Jagger and Jerry Hall..... she got between \$15 and \$25 million
9. Michael Jordan and Juanita Jordan..... she got \$168 million
10. Kevin Costner and Cindy..... she got \$80 million
11. Madonna and Guy Ritchie..... he got \$76 million
12. Mel Gibson's and wife Robyn..... she could get half of his \$950 million
13. Paul McCartney and Heather Mills..... she got \$50 million
14. Rupert Murdoch and Anna..... she got \$1.7 million
15. Neil Diamond and Marcia..... she got \$150 million
16. Alex Rodriguez and Cindy..... she got \$137 million
17. Tiger Woods and Elin..... she got \$150 million
18. Donald Trump and Ivana..... she got \$14 million & two multimillion dollar homes
19. Tom Cruise and actress Nicole Kidman..... she got \$152 million
20. Lionel Richie and Brenda..... she got \$20 million
21. Ron Woods and wife..... she got \$92.5 million

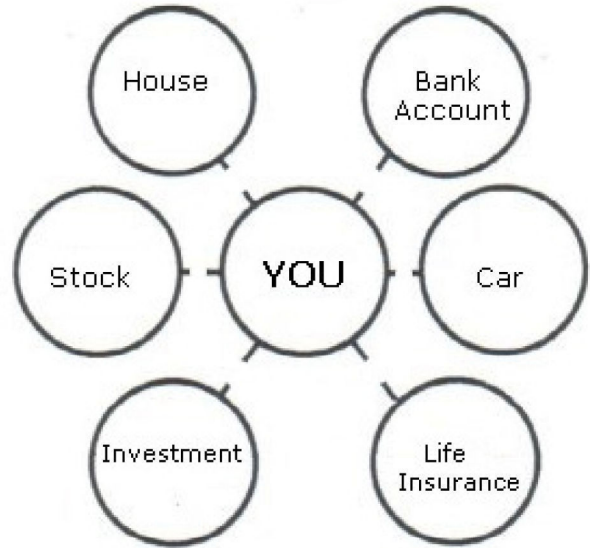
The funny thing is that the act of creating a Private Asset Trust "before" a marriage works better than a prenuptial agreement, and does NOT require the future spouse to review, agree, or sign the trust! In fact, most trusts would also work, *without the doubt and suspicion* that a "Prenuptial Agreement" creates.

Below is a typical unprotected person with assets interconnected in their owners name:



Combined assets allows a single problem like a lawsuit or tax lien to automatically affect the individual person and ALL assets.

The below assets are now structured in individual Private Protective Trusts that are unconnected to each other:



Planning (as above) keeps all assets (and the person) totally unconnected. This means that a lawsuit may only affect a single asset and the other assets could remain private and unaffected.

Some People ONLY have a WILL or Living Family Trust



How about Protection NOW....



Is your time running out?

www.TheProtectionBook.com Phone: (949) 497-3600
Email: info@TrueTrust.com

Lifetime Benefits

(Compare Types of Organizations)

With a Will

*Corporation
or LLC*

Living Trust

Private Asset Trust

*Buy, Sell, Loan, Borrow
or Pledge Assets*

Normal

Officer Must Sign

*Trustee Must
Sign*

*Trustee or Manager
Must Sign*

Flexibility to Do as You Want

Normal

*Shareholders
Must Approve*

Yes, Sometimes

Yes

Maintain Privacy of Beneficiaries

No

Seldom

Sometimes

Yes

Maintain Privacy of Control

No

No

No

Yes

*Separate and Protect Individual
Assets*

No

Sometimes

No

Yes

*Establish Credit Separate from
Personal Credit*

No

Sometimes

No

Sometimes

*Separate Business and Personal
Affairs*

No

Sometimes

No

Yes

Limit State and Federal Taxes

No

Sometimes

No

Yes

Limit Self-Employment Taxes

No

No

No

Yes

Limit Lawsuit Liability

No

Sometimes

No

Yes

*Change Beneficiary Interests as
Desired*

N/A

No

Sometimes

Yes

*Allow for Private and
Government Health Care*

No

No

Sometimes

Yes

*Earn Income Without Affecting
Social Security*

No

No

No

Sometimes

*Documentation and Accounting
Requirements*

Normal

Extensive

Normal

Normal

*Annual Reporting and Annual
Fees*

No

Yes

No

No

Valid in Multiple States

Sometimes

*No, Unless Each
State Paid*

Sometimes

Yes

Startup Costs

Minor

*High if Properly
Organized*

*About 1/2 of a
Corporation*

*About Same as
Corporation*

Annual Costs

Minor

*High if Properly
Organized*

Minor

Minor

Difficulty of Management

Minor

*Medium if
Properly
Maintained*

Minor

Minor

AFTER DEATH Benefits

(Compare Types of Organizations)

With a Will

*Corporation
or LLC*

Living Trust

Private Asset Trust

Eliminates Probate	No	No	Trustee Must Sign	Yes
Eliminates Death Taxes	No	No	Sometimes	Yes
Eliminates Medical Bills	No	No	No	Yes
Eliminates Credit Card Bills	No	No	No	Yes
Continue Protection of All	No	Sometimes	No	Yes
Eliminates Divorce Claims	No	No	No	Yes
Eliminates Prenuptial Agreements	No	No	No	Yes
Allows Tax-Free Vehicle Sales	No	No	No	Yes
<i>Buy, Sell, or Loan Assets</i>	<i>Normal</i>	<i>Officer Must Sign</i>	<i>Trustee Must Sign</i>	<i>Trustee Must Sign</i>
<i>Flexibility to Do as You Want</i>	<i>Normal</i>	No	<i>Yes, Sometimes</i>	Yes
<i>Maintain Privacy of Beneficiaries</i>	No	<i>Seldom</i>	<i>Sometimes</i>	Yes
<i>Maintain Privacy of Control</i>	No	No	No	Yes
<i>Separate and Protect Individuals</i>	No	<i>Sometimes</i>	No	Yes
<i>Maintain Business</i>	No	<i>Sometimes</i>	No	Yes
<i>Limit State and Federal Taxes</i>	No	<i>Sometimes</i>	No	Yes
<i>Limit Self-Employment Taxes</i>	No	No	No	Yes
<i>Limit Lawsuit Liability</i>	No	<i>Sometimes</i>	No	Yes
<i>Change Beneficiary Interests</i>	N/A	No	<i>Sometimes</i>	Yes
<i>Allow for Private and Government Health Care</i>	No	No	<i>Sometimes</i>	Yes
<i>Documentation and Accounting</i>	<i>Normal</i>	<i>Extensive</i>	<i>Normal</i>	<i>Normal</i>
<i>Annual Reporting and Fees</i>	No	Yes	No	No
<i>Valid in Multiple States</i>	<i>Sometimes</i>	No	<i>Sometimes</i>	Yes
<i>Startup Costs</i>	<i>Minor</i>	<i>Sometimes High</i>	<i>Sometimes High</i>	<i>Sometimes High</i>
<i>Annual Costs</i>	<i>High</i>	<i>High</i>	<i>Minor</i>	<i>Minor</i>
<i>Difficulty of Management</i>	<i>Minor</i>	<i>Extensive</i>	<i>Minor</i>	<i>Minor</i>

FINANCIAL PLANNING CHECKLIST

INCOME TAX PLANNING:

- Maximize legal business expenses
- Charitable contributions (Cash and reusable items)
- IRA's, SEP IRA's, 401k, Pension and Profit sharing plans
- Deferral Compensation
- Second home (Vacation home) and Rental deductions
- Employment of family members
- Investments which produce tax-exempt income
- Tax Credits (Childcare, Rehab, Real Estate, Solar, Lights, etc.)
- Travel/Entertainment Expenses
- Office In Home
- Fiscal vs. Calendar tax year
- Employer Paid Fringe Benefits
- 'C' Corps vs. 'S' Corporations
- Installment Sales
- Casualty and Theft losses
- Medical Expense Control
- Ownership of Property
- Sale and leaseback
- Timing of Income/Expenses
- Capital Gains Control
- Other Income

ACCUMULATION PLANNING:

- Investment and Savings Plan
- Emergency Cash Fund
- Safety vs. Risk
- Inflation Hedge
- Capital Growth
- College Education Savings Plan
- Tax-exempt investments
- Tax deferred investments
- Tax credit investments
- Annuities
- Listed stocks
- Unlisted stocks
- Government Bonds
- High yield Bonds
- Corporate Bonds
- Money Market Funds
- Mutual Funds
- Utility Funds
- Gold & Silver In Possession
- Rare Coins and Stamps
- Cash on Hand
- Real Estate limited Partnerships

- Lease Income
- REITS
- CD's
- US Treasury Bills
- Options and Futures
- Prime Rate Funds
- Other Income
- Food On Hand ____ Months
- Survivor Supplies
- Survivor Tools & Plan

RETIREMENT PLANNING:

- IRA, SEP IRA
- Profit Sharing Plan
- Money Purchase Pension Plan
- Target Benefit Pension Plan
- Defined Contribution Pension Plan
- Defined Benefit Pension Plan
- Life Insurance in Plan
- Side Fund Investment Strategy
- Professional Pension Administration
- Special 5 year Averaging
- Integration with Social Security
- Other _____

CASH FLOW PLANNING:

- Positive Cash Flow vs. Negative Cash Flow
- Established Budget
- Emergency Cash fund
- Coordinated with Spouse
- Analysis allowing for Inflation
- Other _____

BUSINESS PLANNING:

- Incorporation
- Determin of Business
- Business Agreement
- Buy-Sell Agreement
- Stock Purchase Plan
- Cross-Sell Purchase Plan
- Key Man Insurance
- Business Liability Insurance
- Corporate Minutes
- Family Business
- Personal Corporation

INSURANCE PLANNING:

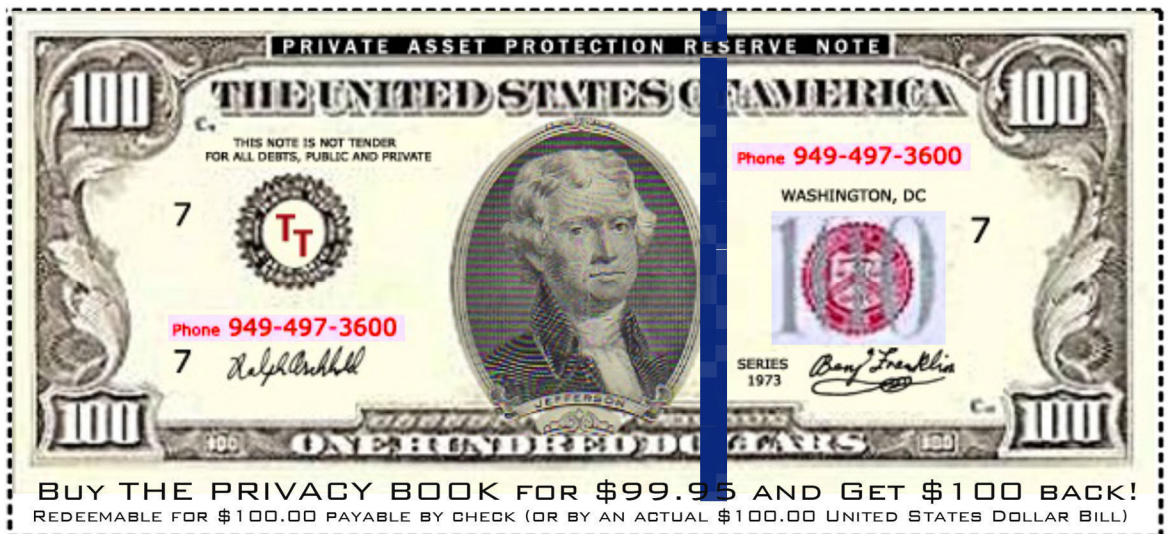
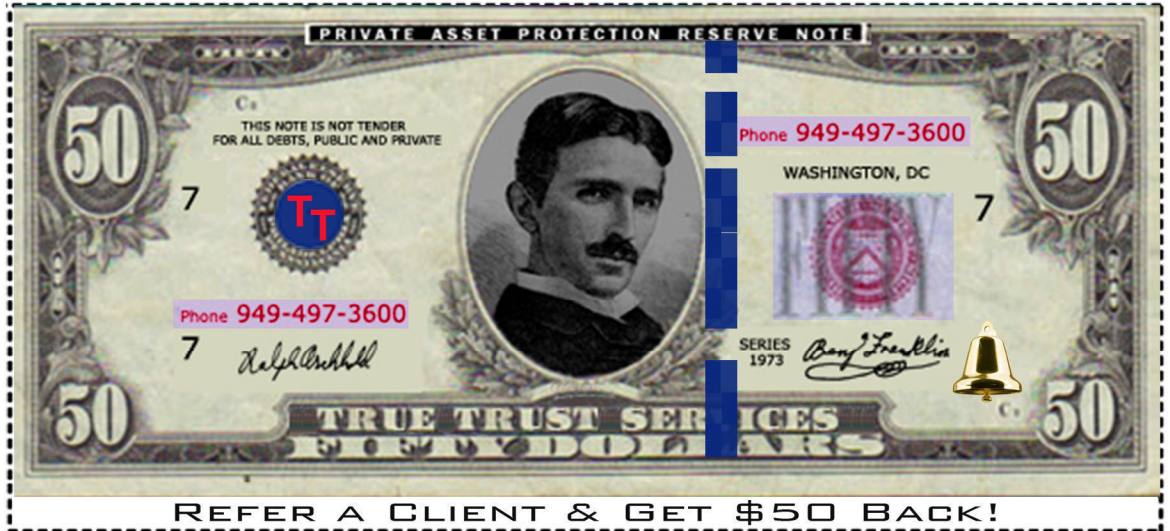
- Family Life Insurance
- Business Life Insurance
- Waiver of Premium
- Mortgage Protection Insurance
- Disability Income Insurance
- Business Overhead Insurance
- Automobile Insurance
- Home, Fire, and Theft Insurance
- Flood and Earthquake Insurance
- Malpractice Insurance
- Board of Directors Insurance
- Umbrella Insurance Plan
- Liability Insurance
- Medical Insurance
- Dental Insurance
- Tax Deferred Annuities

ESTATE PLANNING:

- Simple Will
- Pour-over Will
- A-B Trust
- A-B-C Trust
- Q-tip Trust
- Living Trust (Family Trust)
- Generation Skipping Trust
- QPRT
- Charitable Remainder Trust
- Private Asset Protection Trust
- Constitutional Trust
- Bank Account Trust
- Stock Holding Trust
- Equity Protection Trust
- Property Holding Trust
- UBO/Pure Business Trust
- Sovereign Equity Trust
- Charitable Foundation
- Foundation
- Probate Avoidance
- Power of Attorney
- Durable Power of Attorney
- Health Care Directives to Physicians
- Cash & Estate Liquidity
- Survivorship Life Insurance
- Separate Property
- Joint Tenancy
- Community Property Minimizing Estate Taxes
- Family Ltd. Trust
- UCC1
- Other _____

Rewards, Gifts, and Bonuses

For you, or for a friend...



Ref by: _____ Date _____

MANAGEMENT APPLICATION

PRIMARY SIGNER (Trustee) Only One Signer Required

Expiration Date _____
 Name _____ DL# _____ SS# _____
 Birth Date _____ Birthplace _____ Mom Maiden _____
 Phones _____ Email: _____
 Mail Address _____
 Residence _____

2 SIGNER Trustee Successor Only One Signer Required Two Signers Required

Expiration Date _____
 Name _____ DL# _____ SS# _____
 Birth Date _____ Birthplace _____ Mom Maiden _____
 Phones _____ Email: _____
 Mail Address _____
 Residence _____

3 SIGNER Trustee Successor Only One Signer Required Two Signers Required

Expiration Date _____
 Name _____ DL# _____ SS# _____
 Birth Date _____ Birthplace _____ Mom Maiden _____
 Phones _____ Email: _____
 Mail Address _____
 Residence _____

BENEFICIARIES DURING LIFETIME

FULL NAME	RELATIONSHIP	BIRTHDATE	SS#	PHONE	ADDRESS

REMAINDER BENEFICIARIES

FULL NAME	RELATIONSHIP	BIRTHDATE	SS#	PHONE	ADDRESS

Investment Advisor Contact: _____
 Retirement Advisor Contact: _____
 Tax Preparer Contact: _____
 Insurance Advisor Contact: _____
 Legal Advisor Contact: _____

ASSET CHECKLIST

Residence Property

Estimated Market Value

Loans

_____	_____	_____
_____	_____	_____

Other Real Estate or Time Shares

_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks, Bonds, Partnerships, Other Business Investments

_____	_____	_____
_____	_____	_____

Bank Accounts

_____	_____	_____
_____	_____	_____

Retirement (Pensions, Mutuals, IRA's, 401k, etc.)

_____	_____	_____
_____	_____	_____

Insurance Policies (Life, Health, Annuities, etc.)

_____	_____	_____
_____	_____	_____

Vehicles (Cars, Boats, Cycles, RV, Airplanes, Jet Skis)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Collectables

_____	_____	_____
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Other Assets (Furniture, Tools, Patents, Leases, Equipment, Notes, Court Awards, etc.)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

DOCUMENTS AND SERVICES PROVIDED

Trust Contracts

Bylaws

Minutes

Amendments

Bank Certifications

Bank Accounts

Deeds and Property Documents

Notary

Recording at County Recorder

IRS Identification Numbers

IRS Representation / Review / Research


Research or Review of Legal Opinion regarding questions

Mailing Service, and Phone Contact Location

Insurance Support

Title Service and Review

Delivery Services



TrueTrust.com
Phone: (949) 497-3600
Email: info@TrueTrust.com

www.TrueTrust.com
www.ProtectionBook.com

Platinum Member of the Trust Registry

FREE
20 minute phone
consultation.



 (949) 497-3600 

***“Preparing
For***

***Tomorrow
Today”***

TRUST INSTRUCTIONS

1. Decide if you need a shared trust. If you are married and you own most of your property together, a shared trust may be the right way to go. Your other choice is two individual trusts.
2. Decide what items to leave in the trust. You might not want to hold all your property in your living trust - just the big-ticket items that are headed for probate unless you act.
3. Decide who will inherit your trust property. For most people, choosing family members, friends, or charities to inherit property is easy. After you make your first choices, don't forget to choose alternate (contingent) beneficiaries, too.
4. Choose someone to be your successor trustee. Your trust must name someone to serve as "successor trustee," to distribute trust property to the beneficiaries after you have died. Once you've made your choice, discuss it with the person you have in mind to make sure he or she is willing to take on this responsibility.
5. Choose someone to manage children's property, especially if they are minors (or not able to make good decisions). If children or young adults might inherit trust property, you should choose an adult to manage whatever they inherit. If the children are minors, you can additionally make a trustee a property guardian, which is a property custodian under a law called the Uniform Transfers to Minors Act (UTMA).
6. Prepare the trust and sign it in front of a notary. After making your trust, you (and your spouse, if you made a trust together) must sign it in front of a notary public.
7. Transfer title of property to the trust (usually yourself as trustee of the trust). This is a required step that must be completed. To make your trust effective, you must hold title to trust property in the trust (your name as trustee - for example, if John Smith wants to hold real estate in his trust, he must prepare and sign a new deed transferring the real estate to John Smith, trustee of the John Smith Trust, or it does NOT protect).
8. Store your trust documents safely. Make two (or more) copies and tell your successor trustee where each document is and how to get access when necessary. Do NOT put it in a safety deposit box as it will become unavailable to all the right people when it is needed.

INSTRUCTIONS FOR COMPLETION AND PROTECTION

Please review all documents for:

- errors, mis-spellings,
- the Trustee(s) - person(s) in control
- the Beneficiaries - the heirs

We suggest you sign all documents immediately. Even if you need corrections or modifications, signed documents can protect you until revised documents are completed.

TRANSFERS TO THE TRUST - (Funding)

Real Estate Deeds

Deed(s) to the trust need to be completed. They require a signature in front of a Notary. Then, a deed needs to be recorded at the County Recorder. The trust is not protecting the real estate until the Deed is completed and recorded.

Ownership of Other Assets

The items intended to be owned and protected by the trust must be identified. You can do this by making a list and attaching it to the trust. If the items are expensive or rare, the description needs to be very descriptive. High value items should also be formally transferred by a "Bill of Sale" or a "Transfer Agreement". You could also use photos or a video for identification. Sign them and assemble them into your trust folder for your records. Most of the transfers do not get sent anywhere, but are retained in the trust folder.

Stocks and Insurance

The agent or stock broker will re-title the account to owned as beneficiary or the trust name.

Bank Accounts

It is NOT necessary to create a bank account for each asset or trust. If you need a bank trust account, it can be set up in a trust name. Most banks will allow you to rename your accounts into the "Trust Name". Some banks require starting a new account.

Retirement Accounts, 401k, Roth, and Keogh

It is NOT necessary to change anything, but additional protection can be put in place. Call us to discuss your personal concerns and some additional protections.

Accounting

There are many methods of banking. The usual solution is to create a master bank trust account. Like a manager of many real estate units would maintain, the transactions are all assigned as to the proper unit. There would be an attached definition of each income or expense. This is a common practice and is called "Checkbook Accounting".

Creating individual reports can then be done from the master list of transactions. One popular computer program is called **Quicken**, but there are many others. Ask your tax preparer to suggest a program, but be sure to mark and define every deposit and payment with the item it is associated with.

Recording the Documents

Only the “CERTIFICATION OF TRUST EXISTENCE AND POWERS” will get recorded with the Recorders Office. This document only discloses non-invasive information that allows you significant privacy. Recording costs about fifteen dollars and makes the trust an officially recognized document.

Copies of Records

Deeds get recorded with the County Recorder. Stock gets recorded with the Stock Transfer Agent. All completed documents get recorded with TrustRegistry.net for the additional safety of the trustees and beneficiaries.

Privacy

Privacy in our computer world is becoming difficult. The people of the modern world have already created many public records, starting with birth, marriage, drivers' license, purchase records, subscriptions, warranties, cars, boats, airplanes, credit, banking, and real estate.

It is possible to create a new branch of privacy for any individual thing, such as an asset, that is totally separate from your individual person. It can consist of an investment, a vehicle, bank account, real estate, or whatever. The laws have no effect on eliminating this new privacy, provided that you are not involved in criminal activities. This is exactly the same as the privacy of one corporation (such as Target Stores) private from another corporation (such as Office Depot). In our example the private information of each is private. The public information of each does NOT disclose the names or home addresses or relatives or financial information of the managers or of the stockholders. In fact, the burden of disclosure that those public companies are governed by does not affect individual privacy, just makes them disclose formal reports of public information. On a small level, a trust provides privacy of the individuals involved. It also provides protection, just like stockholders are protected from lawsuits against the corporation.

The county recorded documents only report the information on that document; usually:

1. The legal description of the property transferred,
2. Who transferred it,
3. That a trust received it, and
4. The mailing address.

The information the Protector has, or that TrustRegistry.net archives, is NOT available to anyone except the registered parties.

Disclosure requires permission of the trust creator with their encrypted CODE. The only exception to privacy would be (after proof of) serious crimes like drugs or violence, whereby co-operation and disclosure would be provided.