

Family Trust Starter Kit



WHAT IS A PRIVATE TRUST?

A PRIVATE TRUST IS A CONTRACT THAT PLACES YOUR ASSETS INTO A PRIVATE STRUCTURE WHERE:

- YOU DECIDE WHO CONTROLS IT
- YOU DEFINE THE RULES
- IT STAYS OUT OF COURT

THIS IS HOW FAMILIES:

1. AVOID PROBATE COURT FEES
2. KEEP THEIR AFFAIRS PRIVATE.
3. BUILD GENERATIONAL WEALTH

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HOW EVEN KING HENRY VII FAILED TO BREAK A PRIVATE TRUST

A 500-YEAR-OLD STORY ABOUT THE POWER OF PRIVATE TRUSTS

MOST PEOPLE DON'T KNOW THAT THE TRUST SYSTEM WE USE TODAY
CAME FROM A HUGE POWER STRUGGLE — AND THE KING HIMSELF LOST.

IN THE 1500S, KNIGHTS LEAVING FOR THE CRUSADES NEEDED A WAY TO
PROTECT THEIR PROPERTY WHILE THEY WERE GONE. SINCE WOMEN
COULDN'T LEGALLY OWN LAND, KNIGHTS USED PRIVATE TRUSTS:

- KNIGHT = GRANTOR
- TRUSTED MAN = TRUSTEE
- WIFE & CHILDREN = BENEFICIARIES

THIS KEPT THE LAND IN THE FAMILY, EVEN IF THE KNIGHT NEVER CAME
HOME.

THE CROWN COULDN'T TAKE IT. THE COURTS COULDN'T INTERFERE.
IT ALL OPERATED UNDER PRIVATE CONTRACT, OUTSIDE THE KING'S
REACH.

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KING HENRY VIII HATED THIS

HENRY VIII WANTED LAND TO RETURN TO HIM WHEN A KNIGHT DIED.

BUT TRUSTS SPLIT OWNERSHIP INTO TWO PARTS:

- EQUITABLE TITLE (PAPER/RECORD TITLE)
- USE TITLE (WHO ACTUALLY LIVES ON AND BENEFITS FROM THE PROPERTY)

THE KING ONLY HAD JURISDICTION OVER THE EQUITABLE TITLE, NOT THE USE TITLE, WHICH IS WHERE THE REAL CONTROL IS.

BECAUSE FAMILIES HELD THE USE, THE KING COULDN'T:

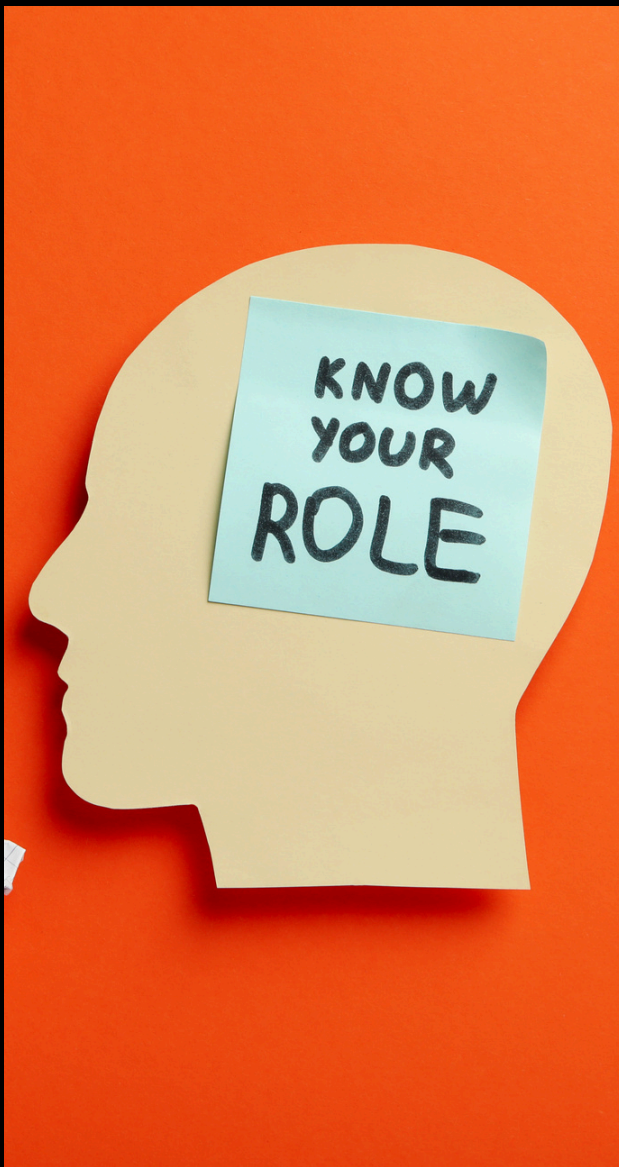
- RECLAIM THE LAND WHEN THE KNIGHT DIED
- TAX IT THE WAY HE WANTED
- CONTROL IT THROUGH HIS COURTS

SO IN 1535, HE TRIED TO OUTLAW TRUSTS ENTIRELY - AND FAILED!

THAT'S WHY TRUSTS ARE THE STRONGEST PROTECTION WE HAVE TODAY

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THE 3 REQUIRED ROLES (AND WHY YOU CAN ONLY BE 2 OF THEM)

GRANTOR — THE ONE WHO GIVES THE ASSETS

TRUSTEE — THE ONE WHO MANAGES THE ASSETS

BENEFICIARY — THE ONE WHO BENEFITS FROM THE TRUST

IF THE SAME "PERSON" FILLS ALL 3 ROLES → THE TRUST COLLAPSES BECAUSE THERE'S NO SEPARATION OF POWER

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WHY MOST TRUSTS FAIL

INCORRECT ROLE SEPARATION

NO PRIVATE JURISDICTION

NO EIN OR BANK ACCOUNT

PROPERTY NOT PROPERLY TITLED

ATTORNEY-CREATED → OWNER DOESN'T UNDERSTAND IT

YOUR TRUST IS ONLY AS STRONG AS YOUR EDUCATION.



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THE 7 STEPS TO BUILDING YOUR PRIVATE TRUST SYSTEM

1. CREATE YOUR PARENT TRUST
2. CREATE SEPARATE SUBTRUSTS FOR EACH ASSET
3. INCLUDING ONE FOR EACH FAMILY MEMBER'S BIOMETRICS
4. OBTAIN EIN
5. OPEN THE TRUST BANK ACCOUNT
6. CONVEY ASSETS INTO APPROPRIATE TRUST
7. LEARN HOW TO OPERATE AND DEFEND YOUR TRUSTS

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HOW TRUSTS PROTECT YOUR FAMILY

- PRIVACY
- PROTECTION
- PRIVATE JURISDICTION
- SEPARATION OF TITLE & USE
- PROTECTION FROM INTERFERENCE
- PROTECTION FOR YOUR HEIRS
- YOUR OWN FAMILY RULES — NOT THE STATE'S

**THIS SYSTEM HAS SURVIVED
KINGS, WARS,
GOVERNMENTS, TAX
REGIMES, AND POLITICAL
CYCLES.**

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WHY YOU SHOULD HIRE A COACH INSTEAD OF A LAWYER

1. LAWYERS GIVE DOCUMENTS.
A COACH GIVES UNDERSTANDING.
2. LAWYERS CHARGE FOR EVERY LITTLE CHANGE.
3. LAWYERS WORK IN PUBLIC LAW. YOUR TRUST WORKS IN PRIVATE LAW.
4. A COACH HELPS YOU BUILD A DEFENSIBLE TRUST.
5. A COACH BUILDS WITH YOU, NOT FOR YOU.

AT THE 2 DAY WORKSHOP,
YOU LEAVE WITH:

- ✓ PARENT TRUST
- ✓ SUB-TRUSTS PER ASSET
- ✓ BIOMETRICS TRUST
- ✓ EIN
- ✓ TRUST BANK ACCOUNT
- ✓ QUITCLAIM DEED
- READY
- ✓ FULL UNDERSTANDING OF HOW TO USE IT

**NO LAWYER GIVES YOU
THIS LEVEL OF
COMPLETION OR
EDUCATION.**

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WEDNESDAY AT 11 AM MST