### AGENDA

# March 3, 2024, 5pm EST. Click to sign up for FREE Intro

- Key Terminology
- Fundamentals
- Origins of Trust (Metaphysical & Biblical)
- World's Oldest Global Trust
- Maritime-Admiralty Influences
- IRS 1099's & Trusts

### March 9, 2024, 5pm EST.

#### Click to sign up for full 5-wk course (\$299)

- Exclusive Private Sessions
- Includes Introductory Class
- Includes Trust Templates and Hand Outs
- Incorporates Workshop on Trust Documentation
- Trust Foundations Building
- Utilizing Trusts for Asset Protection
- How Trusts Factor into Estate Planning
- Revocable Living Trust
- Funding the Trust

**Bonus Content:** Insights on the New Corporate Transparency Act

#### **SPECIAL GUESTS BEGINNING WEEK 3**

- Funding the Trust with an Index Universal Life Insurance
- Tax Planning and Preparation

### TECH HOUSEKEEPING

#### **ACCESS TO ZOOM**

- ☐ If you're experiencing any technical issues accessing the Zoom session, we recommend the following troubleshooting options.
- ☐ Check your app version and update if needed.
- ☐ Restart your device or browser if necessary.

#### **BREAKOUT ROOM**

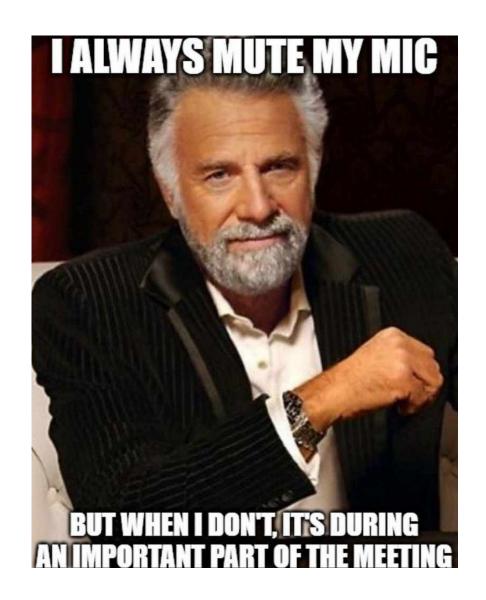
If you can't return from a breakout room on mobile, refresh your screen. On desktop or laptop, close and rejoin using the Zoom link. If you have trouble rejoining, email TrustYourselfCourse@gmail.com

#### **ACCESS TO MEETING**

- We encourage you to sign into your Zoom account prior to clicking the link to join. It's easier to switch devices if you sign into Zoom directly.
- ☐ For the first 45 minutes of class, we'll frequently check the waiting room. After that, we'll do so less often. If you're still waiting to be admitted, please email <a href="mailto:TrustYourselfCourse@gmail.com">TrustYourselfCourse@gmail.com</a>.

## **ZOOM ETIQUETTE**

- ☐ For privacy purposes, please keep your video camera off.
- Please wait for your turn to speak.
- ☐ When speaking, please don't eat or slurp your drink.
- Let others in your environment know that you will be on a Zoom call to minimize distractions.



## **CLARK FAMILY TRUST**

#### Scenario 1

The Clark family is setting up a Revocable Living Trust to manage their assets and plan for the future. The family consists of Mr. and Mrs. Clark and their two minor children, Leticia and James.

