

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 TrustYourselfCourse@gmail.com.

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.

