

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.

I ALWAYS MUTE MY MIC



**BUT WHEN I DON'T, IT'S DURING
AN IMPORTANT PART OF THE MEETING**

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.

