

CONTRACT TRUST CALL

July 11, 2020

RECORD

DISCLAIMER Hello Everyone. Today is Saturday, July 11, 2020. Welcome to our Contract Trust Conference Call. We are not accountants, tax professionals, lawyers or currency dealers. We are not engaged in rendering legal, tax, accounting or other professional advice. Should you require those services, you should retain competent advice from a professional in that field.

WELCOME Thanks for joining us today. My name is Carol Werelius and my associate Jim Knox and I have these calls every 2nd and 4th Saturday of the month. These calls are recorded and available on our website, www.indicatorinformation.com, iqdcalls.com and YouTube. As we get closer and closer to our anticipated event, we thought this would be a good time to review our Common Law Contract Trust, and why we think it is the best vehicle for you to protect your assets.

1. When we started doing these calls about 5 years ago, they were designed as a sales tool. Over the course of the years, we have spent a great deal of time in an effort to educate you about the different types of asset protection vehicles available to you and how to best use them. We hope we have presented the information you need to make an informed decision about using Trusts.
2. Indicator Information has a members only website that was designed to help you properly operate your Trust. We have tried to anticipate your questions and give you the tools you need to do just that. Most of you have taken advantage of this free tool. We understand that from time to time you may have a question that you cannot find an answer for. Jim and I try very hard to answer all of your calls and emails and certainly apologize for any we have missed.

- a. Many of you are still having problems logging into the site. You have either forgotten your logon information or have registered more than once. We understand that our passwords may be a bit cumbersome, but we have been hacked numerous times in the past. That is why we recommend the use of Roboform or other password manager.
 - b. The availability of the website is for your use. You may share it with your co-trustee or successor trustees, but not with a non-member.
3. Until recently, Jim and I have been a 2 man show. We anticipate being “slammed” once this event occurs, so we are adding more people to assist us with completing your Trust needs. Please understand that these folks are word processors and thus, unable to answer your questions. This business is not a turn-key business and the folks that we have hired do not have the knowledge to adequately answer your questions. You probably know as much about Trusts as they do! Collectively, Jim and I have well over 50 years experience in the Trust business, not something one learns overnight. We have not, as some seem to think, deliberately hired people that cannot answer those questions for you. Our goal has always been to provide the best possible asset protection and the tools for you to properly operate your Trusts.
4. We have let you all know that we, Jim and I, will be taking off a couple of weeks post event, to take care of our own business. After that, we will be back on board for an additional 6 or so months. Our staff will be able to complete any additional Trust work for an additional 6 or so months, depending on the need. We will not be taking on any new business post event, so if you think you may be interested, please contact us now for more information, so we will have you in our database.
5. Over the years we have presented not only our Common Law Contract Trust as your Motherlode Trust, but variations of the Standard Trust that include Real Estate Trusts, Vehicle/Vessel Trusts, Investment Trusts, Charitable Trusts and lastly, Management Trusts. They are pretty straightforward, but use of the Management Trust has created some questions. So, Jim is going to further explain and clarify the Management Trust for you today. Jim?

Thanks to all for you for your time and attention. My name is Carol Werelius. My numbers are 425-820-8090 or 877-333-5018. I am available between 10 and 6 Central time. The best way to reach me is by email.

info@indicatorinformation.com. Have a happy and safe weekend! Go RV!