

**CONTRACT TRUST CALL**  
**NOVEMBER 9, 2019**

## **RECORD**

**DISCLAIMER** Hello Everyone. Today is Saturday, November 9, 2019. 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. As we get closer and closer to our expected RV, 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.

We have learned that we MAY be at the banks next week! This is what I learned yesterday

*Official from Fleming*

*“Money is beginning to flow in Reno...Church groups and Foundations are becoming liquid as well as individual Tier4A , luminaries and whales*

*,  
There is a meeting going on on [3PM EST \(Friday\)](#) to decide release of the 800#s either today and no later than Monday! Tuesday is EXCHANGE DAY for our Tier 4B...Hurrahhhhhh!*

*Please spend the weekend putting together a plan on what you are going to spend the money...how you will help your family, community and projects...it will determine your exchange rate!*

*So everything is ready...be calm cool collected!*

*Also the military with Interpol and the Chinese will be completely in charge at the*

*exchange for a smooth process!”*

*Good luck*

*Additional info*

*Quick review: Chinese are making sure this happens and no more delays. After the 15th the US would lose all the perks from the Zim exchange. But he said tier 3 and large church groups are exchanging right now in Reno and being made liquid. Tier 4 A and B will be getting the 800# possibly today but might be Monday and will set up to exchange Tuesday. He was pretty set it's done and meeting right now to determine when to release the 800#.*

So, if you're still with us, and not jumping up and down for joy, let's talk about Trusts.

1. You've no doubt heard of various kinds of trusts, structured pay-outs, group rates, NDAs, 800#s, etc. Even with the best of intentions, these same people and sites are stating that NO ONE knows the actual rate or date of the RV. Same as to taxation. I have heard everything from put aside 50% for taxes, to it won't be a taxable event, either federally or by the states. I think putting aside 35-50% is a good idea, if it is taxed in a year, you have the money to cover it. If its not taxed, you have a bonus!
2. Until the "Official Rules of Engagement" are made known, we recommend setting all these rumors aside. We're not Guru's but assure everyone there will be time and an orderly arrangement made known to us all from various sources. Just be ready!
3. People have asked why should I establish a trust rather than continue owning currency in my own name & Social Security number?
  - a. Owning anything in your own name and Social leaves your assets exposed. If you were to exchange in your own name, then have an accident or heart attack on the way home, all that money would be at risk, would be taxed at the federal rate of 40%, after the \$5.49 M exemption. The assets could be tied up in court for years, and your family may not see any of it for a very long time.

- b. Having assets in your name leaves you wide open for lawsuits and others wanting you to part with your new found wealth.
  - c. On the other hand, if you exchange into a properly crafted Trust, and then have an accident or heart attack on the way home, the assets REMAIN in the Trust, with no probate, or estate taxes. It will be managed by the Successor Trustee(s) that you previously named.
4. There's lots of talk out there about other kinds of trusts. Why is a Contract Trust so superior?
- a. Most other Trusts are statutory in nature, meaning they get their power and strength from locally (usually state) enacted laws. They are often recorded in that state or county, thus no privacy. They are sometimes required to pay a state recording fee every year.
  - b. This is also true of most corp's, LLC's, Statutory Trusts.
  - c. The Contract Business Trust that we employ is a creature of common law. It gets its power and benefit from the US Constitution. Most states require recordation only if the Trust is actively involved in commerce. This guarantees your privacy and you don't have annual recording fees.
5. The benefits of the Contract Trust are many.
- |                                   |   |
|-----------------------------------|---|
| Created by Contract.              | Valid in all 50 states.                     |
| Completely personalized.          | Financial privacy.                          |
| Trust owns assets, you don't.     | Suitable for business and personal use.     |
| You manage assets.                | No government registration.                 |
| An agency of commerce.            | Avoids agony of probate.                    |
| Enjoys Constitutional rights      | No inheritance or estate taxes.             |
| Tax advantages.                   | Renewable life.                             |
| May avoid Capital Gains.          | Corporate advantages without incorporating. |
| Serves as a prenuptial agreement. | Judgment proof assets.                      |
| Limits liability.                 | May reduce income taxes.                    |

Minimizes self-employment tax.  
Does not register with most states.  
Tax free start-up.

Lawsuit protection.  
Creates artificial poverty.  
Works with Limited Liability  
Companies.  
Business plans are private.

Avoids Medicaid/Care issues.  
May operate as a business or holding company.  
Both legal and equitable titles stay in Trust.  
Proven court history.  
Is irrevocable.

6. Why are Contract Business Trusts so ideal in controlling, vs. personally owning assets?
  - a. As many of you know, the Trust we use is technically a Business Trust. Many of us have had issues with bankers not understanding what a Business Trust is. They ask for Incorporation or LLC paperwork and business licenses. We decided to make it simple and refer to it as a Contract Trust. In fact it is the same Business Trust with all of its many advantages.
  - b. At the creation of the Contract Trust, you irrevocably exchange your assets, in this case your currency, into the Contract Trust. You no longer own them, but you have complete autonomy in managing them. You don't own the assets, so no one can take them from you.
7. What is the difference between an Irrevocable & Revocable Trust?
  - a. An irrevocable trust cannot be changed or revoked. You exchange those assets, period. They are no longer yours.
  - b. A revocable trust can be changed or terminated at any time. Because of this, the IRS may invoke the "claw-back" provision, putting your assets back into your estate, where they can be added to your personal estate. Very important consideration at tax time.
8. Why aren't banks, attorneys & CPAs more familiar with Contract Trusts?
  - a. Contract Business Trusts are common law. Common Law is rarely taught in our colleges and universities anymore.

- b. Some attorneys are aware of the Massachusetts Contract Trust, but once in place, they make no money from them. It's been said that the file cabinet full of Revocable Living Trusts are the attorneys retirement!
9. As Trustee of the Contract Trust, you retain full management, control and benefit of the assets of the Trust. There is no one between you and your money.
- a. You may name your spouse as co-Trustee.
  - b. One or both of you can become Executive Trustees, allowing one to act on behalf of the other.
  - c. You may name your children as Successor Trustees.
  - d. You may designate one or more Successor Trustees, specifying that they both become Trustees at the same time, or one goes before the other. You can change this designation at any time for any reason.
  - e. You can add a "bloodline" clause, to ensure that your family's generational wealth does not fall into other's hands.
  - f. You can also add a "spendthrift" clause so no one can hypothecate or pledge his or her possible share of Trust income.
10. Some people are concerned that there is a conflict of interest in being your own Trustee.
- a. Once you exchange your assets, you no longer own them. By the terms of the Trust, you are eligible to become Trustee. We feel that if you were able to put those assets together, you are the most logical choice to continue to manage them.
11. Can a Successor Trustee be changed due to unforeseen circumstances?
- a. That person or person can be changed at any time, for whatever reason.
  - b. We can also add a Spendthrift clause so future Trustees and Certificate Holders can't compromise or obligate the assets of the Trust.
  - c. We can also add a "bloodline succession" clause if you desire.

12. There are several ways to enjoy the benefits of taking money out of a Contract Trust and using these funds and income with the least amount of personal taxation.
  - a. You can take a salary or draw. The amount can be whatever you determine you need, at whatever intervals work best for you. At this point in time, it will be taxed to as 1040 or 1099 income. That may change post RV.
  - b. The Trust can pay expenses. Not just typical items like telephone, internet and car expenses, but business trips, etc. Be sure to look at some property, pick up brochures and business cards on that next trip to the Caribbean.
  - c. As a Certificate Holder, you have the right to a distribution.
  - d. Your Mother Lode Trust can fund additional Trusts to purchase and hold property like real estate and vehicles. This is NOT a taxable event.
  - e. You may also borrow from the Trust, which is not a taxable event.
  - f. You can lend money from the Trust or make a gift if you feel one is deserved.
13. Can I add other assets into a Contract Trust (like real estate) along with foreign currency, or do this later?
  - a. We strongly suggest you keep other assets separate from what we like to call the “Mother Lode” Trust. Your goal here is to keep this Trust and its assets totally private, known only to you and your wealth managers.
  - b. Additional trusts for real estate and other assets can follow later.
14. What other Trusts do you offer?
  - a. We have many secondary Trusts.
  - b. Some have chosen to use a secondary trust as a Bank Account Trust.

This account will receive funds from your Mother Lode Trust so that it can function as your purchasing or lending arm. Hypothetically, it functions much like the branches of a tree; it has more exposure and it is easier to break or penetrate, but it is an account that connects to some levels of the outside world.

- c. Place adequate funds in this account to easily cover your prospected purchases and to cover several outgoing expenses for easier manageability.
  - d. View your that Trust as the entity that can lend money to purchase large ticket items like vehicles, land and homes, and to disperse funds into other areas of your Trust Organization. It will fund other accounts such as: Charitable Trust, Real Estate, Vehicle Trusts, Investment Trusts, Management Trusts, etc. It can also fund your personal checking account for daily and personal expenses.
15. Right now, pre RV, you don't NEED all of those Trusts, but post RV, you will WANT them. As one might imagine, taking care of all of the mundane issues dealing with ownership could be very difficult and time consuming. For that reason, we suggest using a Management Trust.
- a. This Trust will have its own EIN and bank account.
  - b. This Trust has full power to dispose of the properties and complete control over its management such as; paying insurance, maintenance, repairs, upkeep of home and property, etc.
  - c. As Trustee, you still control the assets in the Trust and the income they produce.

Jim  
Pricing ans special offer

Carol close.

Thank you for your attention today. I am in the Central time zone and usually available from 9 -5. If the RV does indeed happen next week, Jim and I will be

unavailable for a couple of weeks. We will return for 6 months, but we have staff available to create new trusts for you. You can reach me at 877-333-5018. My email is [info@indicatorinformation.com](mailto:info@indicatorinformation.com).