

CONTRACT TRUST CALL #139
March 26, 2022

RECORD

DISCLAIMER Hello Everyone. Today is Saturday, March 26, 2022. 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 my partner 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, call indicator-calls.com or iiicalls.com As always, your questions are welcome. *6 to raise your hand.

Typically we review our Common Law Contract Trust, and why we think it is the best vehicle for you to protect your assets. Today, we would like to take the opportunity to talk to you about a few things we will all be facing in the (hopefully) near future.

As prudent adults, we are faced with things many of us have never thought about. One of the big issues is security; personal, professional and financial. That brings up more questions; attorneys, tax planners, accountants, financial advisors and estate planners. How are we going to manage and protect our assets? There are all kinds of entities available to us; many of us have listened to webinars, seminars and conference calls, not to mention advice from friends. We have been told about Corporations, C Corps, LLCs and Trusts. I recently read that there are over 30 different trusts available to us. It is enough to make any one of us shake our heads and say “Whoa!”.

As a student of asset protection for many years, I have run across most of them. While all of these different entities are viable, they all have their pros and cons as

well. Some are more suited to one need than others. Some have advantages the others do not. Some have better tax options than others. Some offer complete privacy, some do not.

A properly created irrevocable Common Law Contract Trust allows you, as the Exchanger, to become the Trustee of that Trust; thus, guaranteeing complete control and privacy. A common law instrument, the Contract Trust is designed to hold and protect assets. It is a valid, legal entity that may be used as a business organization if desired. Most states do NOT require recording, filing or a business license unless the Trust is actively engaged in commercial or retail business.

So, how does a Contract Trust work? You form a Contract Trust Organization through a properly prepared contract, Trust Organization Minutes and Trust Organization Agreement, called an Indenture. Oversimplified, you exchange your assets with the Contract Trust Organization for Certificates; the Trust itself then owns both legal and equitable title to the assets. After the Trust is created, you may apply for a Tax Identification number (TIN or EIN) from the IRS so you can open a bank account in the name of the Trust.

No gift taxes are paid because no gift was made. You do not own the Contract Trust Organization. You personally no longer own the assets. You and your family members or associates may be appointed Trustees who manage, control and direct the desired benefits of the Contract Trust Organization's assets. This provides excellent asset protection and eliminates probate and inheritance issues.

Most Trusts are created in contemplation of death, as opposed to the Contract Trust which is created in contemplation of life. The Trust has a limited life of 25 years, and is renewable every 25 years. You will die, but the Trust will not. In the event of a Trustee's death or incapacity, the Successor Trustee assumes his or her duties immediately. There is no waiting, no filing or court approval necessary. Your Trust Certificate becomes Null and Void and a new Certificate must be issued by the remaining or Successor Trustee.

The best way to protect and preserve assets is give them up, while retaining all the control. This concept of non-ownership is sometimes a little difficult to comprehend. But, think about it! Why own assets when someone else can own

them for you? That “someone else” is a Contract Trust Organization. This is a legal entity created from common law.

Many of us have been advised to hire “transition teams” to assist us with managing our money. While it may be premature to start interviewing people at this time, you may want to consider Personal Bankers, Relationship Managers, Humanitarian Advisory Teams, as well as Wealth Management Teams, Trust Management Teams, IT Teams, Medical and Health Advisory Teams, Real Estate Specialists, Legal and Tax Specialists and Security Teams.

Some time ago, I read "A Matter of Security", which I found very interesting. While the author spoke mostly about personal security, I really liked his preface to the article, so I would like to share that with you, today.

"For myself, like many of you, having financial wealth will be something of a new concept. We have seen wealth in movie stars, sports heroes and the wealthy elite alike, but have never experienced this wealth personally. If you are like me, you say to yourself “I would never trade my soul for a single dollar” if that is being what wealthy means. To many wealthy people in the public eye, wealth equates to power, notoriety, and influence. The money becomes secondary to these things that they have worked so hard to achieve. Their status and image must now be maintained through greed and indifference, not through Love and compassion. But for those that are reading this publication, your wealth is based on a humanitarian perspective where ego has no place. There will be those who wish to take away what you have so long hoped to possess for their own greed and power. Therefore you will need to change the way you currently live and think to protect your new found wealth so that you can help people through your foundations and charity."

This brings up a couple of issues, financial security, with which we can assist you, and personal security. The Common Law Contract Trust that we provide will protect your assets from those who wish to take it away from you.

I feel we all need a certain level of security and privacy.

We have heard about NDAs, not to say anything to anybody about the source of our new found wealth or the amount you have. That may seem like a “well, duh”

moment, but while you may be close mouthed, your kids, your family, even your neighbors and co-workers may not be.

For your own protection, the best thing is to ZIP your mouth on how much you have and don't expose yourself with unnecessary luxury. People notice.

If someone asks for money, tell them, "All my assets are in Trust. I will have to ask the Trustees." They don't need to know that you are the Trustee.

No matter how well protected you believe you are, someone wants to take something from you. There are three things a criminal wants from you, your possessions, your innocence, or your life. Sometimes they take all three. Don't make yourself a target.

Jim, do you have something to add?

It is my pleasure to introduce you to **Raidon Tactics**. It is operated by Frank McRae. He is the former head of the US Army Special Forces Advanced Reconnaissance Target Analysis and Exploitation Techniques Course (SFARTAETC) at Ft. Bragg N.C. He was then assigned as an Instructor to the SFARTAETC at the Special Warfare Center and School in Ft. Bragg NC, was **promoted and became the NCOIC of the course and awarded for having the highest graduation rate for the course in its twenty-year history**. He is the REAL DEAL! If you need security, and you WILL post RV, this is the company to be using. I certainly will be! We will start a five week ZOOM call on Tuesdays starting on April 5th. I will be sending out reminders on the Monday before the call with the specifics and the time of the call. All of those Zoom calls will be loaded on Indicator website for viewing by you at your leisure.

I think that about wraps it up for today.

Contract (Business) Trusts have withstood the tests of time and the courtroom. They are approved by the IRS and have been used for generations by many of the wealthiest families in the US to preserve their fortunes. In a nutshell, this is the most powerful asset and estate preservation method known.

Our Trusts are priced at \$1995 for your first or Motherlode Trust. Additional trusts are \$1695 and we accept all major credit or debit cards.

Jim close

Thank you for you 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 5 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!