

## CONTRACT TRUST CALL #140

# RECORD

**DISCLAIMER** Hello Everyone. Today is Saturday, April 9, 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 2<sup>nd</sup> and 4<sup>th</sup> Saturday of the month. All of our previous calls are recorded and available on our website, [www.indicatorinformation.com](http://www.indicatorinformation.com). As we get closer and closer to our expected exchange, 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. As always, your questions are welcome. \*6 to raise your hand.

1. The Common Law Contract Trust has many features and benefits.
  - a. You can be your own Trustee. No one between you and your money.
  - b. Is irrevocable, providing superior asset protection.
  - c. The Trust owns the assets, you manage them. No one can take them from you.
  - d. Insures financial privacy. No one knows what you have.
  - e. Valid in all 50 states.
  - f. Avoids state income tax if correctly domiciled in a state that does not levy such a tax.
  - g. No double taxation, unlike a corporation or LLC.
  - h. Is eligible for an EIN. We obtain one for you.
  - i. Provides for future generations. You name your own successor trustee.
  - j. Limits liability. You don't own assets, no one can take them from you.
  - k. Avoids probate. No waiting, no attorneys no government

- intervention.
- l. Avoids death and inheritance taxes. Your estate remains intact upon your death.
  - m. Estate preservation provides for generational wealth.
  - n. No government/state registration. Provides for your privacy.
  - o. No annual fees. Saves time and money.
2. Your Contract Trust consists of the Contract and Declaration of Trust, Specific minutes and notary pages. Schedules for your assets. Extra Minute pages for future use. Certificates and Abstract of Trust. Access to our website with complete instructions and essays on uses of Business Trust in commerce. Legal opinions on uses of the Trust. Sample minutes and documents for your use.
  3. We obtain an EIN for the Trust name you choose.
  4. Your currency gets into the Trust by the initial exchange.
  5. You can add more currency by Minute, as you acquire it.
  6. You do not have to share how much currency you have, just the types of currency.
  7. There are several ways to get money from the Trust. You can borrow, draw a Trustee salary, get reimbursed for expenses, take a distribution or fund new Trusts for specific reasons.
  8. Initially, all you need is a Motherlode Trust, which holds your currency and will be the Trust you use at your exchange. You will probably want additional Trusts in the future such as Management Trusts, Real Estate, Vehicle, Annuity, Charitable etc.
  9. Jim and I have been in the Trust business over 30 years each.
  10. Neither Jim nor I are aware of any negative issues our clients have experienced because of the Trust.

11. We are not planning on retiring any time soon. However, we will both be taking a few weeks off immediately post RV to attend to our own business. We understand that you may be anticipating purchasing some property or vehicles during that time, so we are offering an Abstract of Trust to assist you in closing those deals. The application is on our website, [www.3itrustapp.com](http://www.3itrustapp.com) and costs \$200. This is only available to existing clients.
12. There seems to be a lot of confusion regarding the actual exchange. From what we understand, there will be special exchange centers all over the country, set up specifically for those of us in Tier 4b, the so-called Internet Group. If you are on this call, you are in 4b. If you bought your currency from an authorized dealer, you will probably get an email from Wells Fargo or HSBC, advising you of the safe-link website to set your appointment. Don't be alarmed if you don't get the email. Several of the "gurus" will be posting the safe-link website when they get it. We will send a blast email saying the Eagle has landed, with links to the above "gurus". From what we've read, the exchange centers will offer higher contract rates than the banks.
13. Some folks are still talking about going to their local bank to exchange. There are some drawbacks to this. You will be dealing with people in your community. Do you really want anyone to know you suddenly deposited millions of dollars? I think not. Also, the rates offered by the banks are said to be substantially lower.
14. More than likely you will be told what to bring to your appointment. At the very least, you will need;
  - a. 2 pieces of valid ID
  - b. Proof of address, usually 2 recent Utility Bills
  - c. Abstract of Trust
  - d. Tax ID Letter
  - e. Copy of your Trust (do not offer it)
  - f. Your currencies, neatly bundled and labeled
  - g. Currency Tally Sheets for each currency
  - h. Exclusions to your NDA
  - i. Bank Account Info, if you have it.

- j. Currency Receipts, if you have them.
  - k. Gift Letters (to you)
15. I have prepared a binder that includes all of these, plus a short bio and humanitarian plans that I have. I don't have any projects of my own, but intend to fund projects others have presented to me. I also have a 90 day and 6 months needs budget. Also, what I feel I must do as soon as possible, like hiring an assistant, providing for security, interviewing and hiring Personal Bankers, Wealth Advisors, etc.

Jim, what would you like to add today?

Jim close

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](mailto:info@indicatorinformation.com). Have happy and safe weekend! Go RV!