

CONTRACT TRUST CALL #179
February 10, 2024

RECORD

DISCLAIMER Hello Everyone. Today is Saturday, February 23, 2024. Welcome to our Contract Trust Conference Call #179. 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 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, 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.

1. We offer a non-Grantor Irrevocable Pure Common Law Business Trust Organization. We have been talking to you about Contract Trusts and common law for the last several years. The Trust that we use is based on the Massachusetts Business Trust. When looking it up in a Law library, you will find it in the B as in Boy section, not in the T section with all other trusts. It is a unique entity that is not a grantor trust, nor is it revocable. It is based on

the law of contracts. We, as Americans are guaranteed the right to contract by our Constitution.

2. Let's take a closer look at the name of our Trust;
 - a. non-Grantor You do not give your assets to the Trust, you exchange them for \$21 and 100 Certificate Units. The Exchange avoids Capital Gains taxes.
 - b. Irrevocable Means the Terms of the Trust cannot be changed. It can protect assets from creditors, you as Trustee only manage, not own, the assets. No one can tell you to revoke the Trust to pay a creditor. You still have total control of the Trust by writing Minutes according the Trust Indenture.
 - c. Pure Means the holders of Beneficial Interest have no control over the Trustees and the management of the Trust.
 - d. Common Law Means the law of God and the land, not laws created by statute.
 - e. Contract Means created by Contract. Our US Constitution guarantees us the right to contract. This is a contract in Trust format. Proven court history, authentic legal contract, better than an agreement.
 - f. Business Trust A valid, legal entity or artificial person in law. Known as an Unincorporated Business Organization in a trust format. Has the option to operate as a business or Holding Company.
 - g. Organization Not a partnership, joint stock company, or any other form of association or statutory trust, LLC or corporation. For the most part, all of these types of Trusts and business entities rely upon and derive their power, privilege and benefit from Statutory Law for their creation and existence, meaning that

statutes had to be first passed into law in order for these kinds of Trusts to be created. Even more importantly, such statutes or laws determine how they are to be treated for legal and tax purposes, both Federal and State, such as Estate Taxes and / or Income Tax.

3. Non-Grantor Irrevocable Pure Common Law Business Trust Organization is a mouthful, so we shorten it by simply referring to it as a Contract Trust. It easy to create and operate. You exchange your assets into the Contract Trust for Trust Certificate Units. The Trust then owns your assets. There is no separation of legal title and equitable title - both titles united in trustees. Total control of the trust property resides with the Trustee.
4. You are eligible to be the Trustee. As Trustee, you still manage, control and enjoy the benefits and income of the trust's assets as if you still owned them.
5. It is a Non Grantor contract with provision to live on for eternity. The Contract Trust doesn't die when you do. Successor Trustees of your choice assume control of the Trust's assets upon your death; there are no issues of probate, death taxes or any legal or government interference.
6. The Contract Trust is an entity created to live. It is private; you never lose control of your assets. Property transfer is immediate and tax-free. It has a limited life of 25 years, which can be renewed every 25 years by merely writing a Minute. It can pass on assets (property) in perpetuity and benefit numerous persons.
7. Contract Trusts can protect your assets from bankruptcy and judgments. This is not a Living Trust. Living Trusts avoid probate, but they are born to die, as such they do not provide asset protection. The assets in Living Trusts are subject to federal and state taxes, and do not offer the business and tax benefits available with a Contract Trust.
8. You control the assets and the income the Contract Trust produces. This is not a secret nor new form of business; it is constitutionally protected and

upheld by the Supreme Court of the United States. Patrick Henry created the oldest Common Law Trust in the U.S. To my knowledge, it still survives today from its creation in the 1600's.

9. The benefits of the Contract Trust are many:
 - a. It is created by Contract, as guaranteed by the US Constitution and is completely personalized.
 - b. The Trust owns the assets, you don't, but you manage and control those assets.
 - c. It is ideal for business and personal use, and it is valid in all 50 states.
 - d. It is an agency of commerce that enjoys constitutional Rights.
 - e. It provides a tax free start-up with NO government registration.
 - f. It limits liability and ensures financial privacy.
 - g. It creates artificial poverty.
 - h. It works with Limited Liability Companies.
 - i. It avoids Medicaid/MediCare issues.
 - j. It provides lawsuit protection, and judgment proofs assets.
 - k. It totally avoids probate, inheritance and estate taxes.
 - l. It can even serve as a prenuptial agreement.

10. In a nutshell, a carefully drawn and legally operated Contract Business Trust can enjoy many of the advantages of a corporation or other artificially created entities without the burdens and restrictions. They might be as follows:
 - a. Limited liability
 - b. Estate preservation
 - c. Privacy and anonymity
 - d. Single taxation, not double
 - e. Legally maintaining control as Trustee

11. A Contract Trust is established by Contract involving two or more people. This right to contract is guaranteed by the "liberty" clause of due process as contained in our own Constitution, specifically Article One, Section Ten. In other words, our right to contract is literally guaranteed. A lawful contract must meet all three of the essential elements of a contract: (1.) Offer, (2.) Acceptance and, (3.) Consideration.

- a. Assume that an individual (such as yourself), whom we'll call an Exchanger, desires to transfer title to property, real and / or personal, to his or her intended heirs using a Contract Trust. After the Contract or Indenture is properly drafted it becomes a legal entity, the Exchanger makes the Offer, fulfilling # 1 above.
 - b. Since this Contract Trust entity is at first merely pieces of paper and just like a Corporation, cannot act or speak for itself, a real person needs to be selected or appointed to facilitate this Exchange and sign the appropriate documents for and on behalf of the Contract Trust. This person is called the Creator, and makes the Acceptance, fulfilling # 2 above.
 - c. After the Transfer and Acceptance are completed, Shares of Beneficial Interest (Certificates) are issued to and received by the person making the transfer. This satisfies the third element, that of Consideration, or # 3 above. It is important to make note that all of this process is done irrevocably. In other words, the contract is completed and it is set now in stone!
 - i. These Certificates state: "These Certificates Contain the Rights of Royalty Income Only to the Holder Thereof at the Sole Discretion of the Trustee(s)."
 - ii. But here's an important KEY: These Certificates also state that: "Upon the death of the holder thereof, these Certificates become Null and Void."
12. Included in the Contract Trust Contract Indenture is the naming of the desired Trustee or Trustees, including their all-important powers.
 13. Here is another key element of a Contract Trust: The Exchanger may be named as and appointed to be one of, if not the only initial Trustee of the Contract Trust, "as if," they were a completely different person in the law. In other words, they are occupying more than one role in this contractual undertaking. Obviously, upon his or her death, the Contract Trust contract

- could, and should provide for subsequent Successor Trustee(s) to take over so that the Contract Trust might continue forward as originally intended.
- 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.
 - b. The Trust can operate with a single Trustee. In the case of a married couple, one spouse typically appoints the other as Co-Trustee.
14. You must name a Successor Trustee. Most people choose one or more adult children to be their Successor Trustee. Successor Trustees simply take over the management of the Contract Trust when you and your Co-Trustee die. If your children are minors, you need to name an Interim or Custodial Successor Trustee.
 15. Many of us will be creating generational wealth when the event occurs. 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.
 - a. 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, thus further protecting it from possible future reckless behavior or management.
 16. Upon the death of the original Exchanger, their Certificates revert back to the Contract Trust and the remaining Trustee or persons appointed as Successor Trustee(s) have absolute authority to issue new Certificates to anyone of their choosing. Since the Contract Trust doesn't die like a natural person, there can never be any "death tax," Federal Estate Tax, or State Inheritance Tax upon the Contract Trust assets after once being initially transferred into it.
 17. We understand that you may be concerned with the paperwork necessary to keep your Trust up to date, so we have created our members only website www.indicatorinformation.com to guide you.

- a. The biggest thing to remember with an asset protection plan is “own nothing, control everything”.
 - b. Do not commingle the Trust money with your money, like your Social Security benefit or any 1040 income you earn. That's a big no-no.
 - c. You also need to write periodic minutes to reflect your actions and give your future successor Trustees a history of what you have done with the Trust. An End of Year Minute is essential. There is a sample on the website.
 - d. EVERYTHING you sign as Trustee should state, “As Trustee only and not otherwise.”
18. We have gone to great lengths to provide you with the best personalized, Common Law Asset and Estate Protection Contract Trust available. Years of research have gone into perfecting what we know is unquestionably the strongest tool obtainable for asset protection and estate preservation. In order to make the Contract Trust as easy as possible to implement, we include the following;
19. You shouldn't gamble with your family's assets. You can protect your assets, business, family and your future. Saving and securing assets for retirement is a daily challenge. You can have the assurance that money cannot buy and you can have that peace of mind at an affordable price. Indicator Information Institute can show you how to insulate assets from those who some day may wish to claim them. You can protect yourself and your family with a Contract Trust.
20. In summary, when properly drafted and utilized, a Contract Trust, or better yet, multiple Contract Trusts, can accomplish many beneficial aspects of passing one's assets to their intended heirs without probate, gift, state inheritance taxes or Federal Estate tax, all with the greatest measure of privacy and protection from creditors, yet retain control of their estate assets “as if,” all assets were still in their own name(s) during their mortal existence.

Jim

Q & A Please no questions about login issues. If you are having difficulty logging in to the website, go to www.3itrustapp.com, login issues. Jim will respond shortly. Be sure you are not using a VPN for another country. You cannot change your password. The login does not work on all phones. Again, we strongly recommend you use Roboform or any other password manager.

Lately, some of you have expressed some concerns that Jim and I won't be around to service your Trust needs in the future. Although we work very well in tandem, we are independent of each other. Jim had his own Trust business before I asked him to join me. As most of you have heard my husband and I started Indicator in 1992, long before we met Jim. So if for some reason, if something happens to one of us, the other is still available. We also have Karen Fujita on our staff. I have known Karen for more than 20 years. She is a valuable asset to our team and is very knowledgeable about Trusts.

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 \$300 referral fee for any fully paid new Trust. We DO NOT charge annual fees, custodial fees, or any other recurring costs.

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 Trusts, etc.

- a. You may have heard that we will need separate accounts for whatever currency you exchange. The key word here is Account. You can open multiple accounts under the same Trust. If you do have more than one Trust, use them for your Exchange.
- b. You may also want our Triple Play, which includes a Pour-over Will, Durable Power of Attorney and Health Care Directive.

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! Happy Valentines Day. Go RV and God Bless America!