

GENERATIONAL WEALTH BUILDER

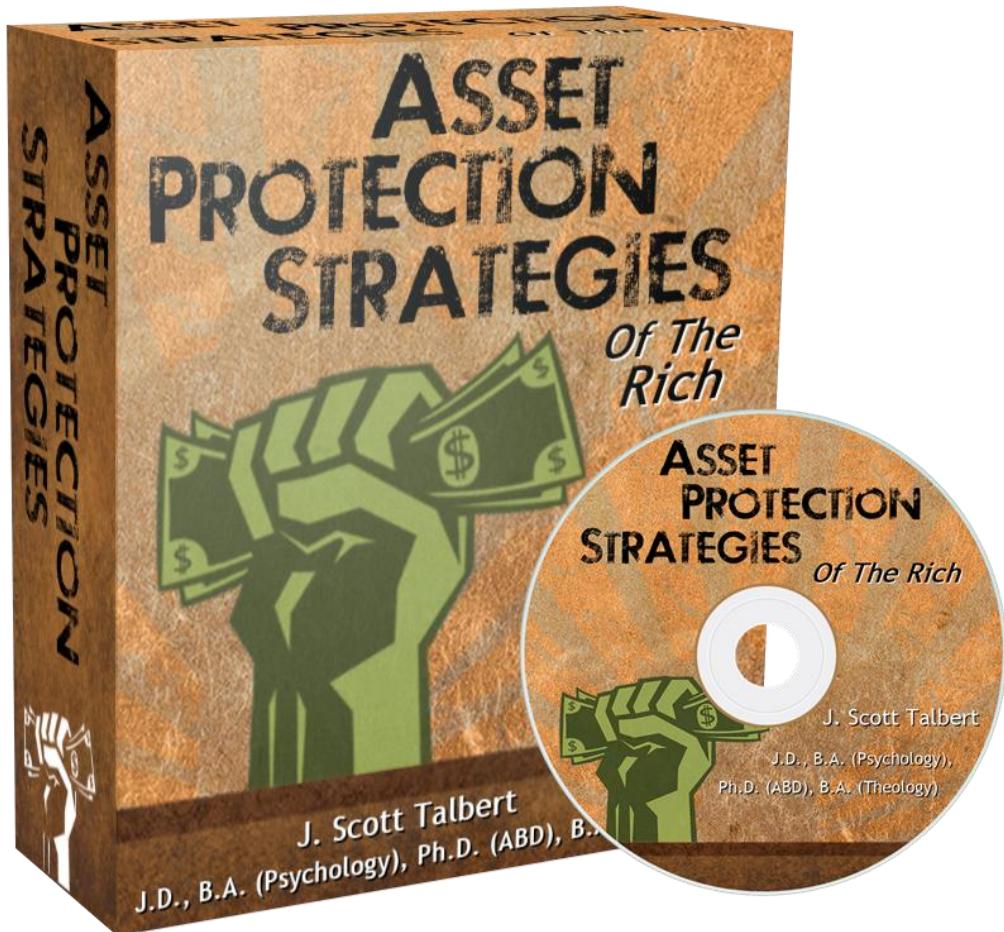
INSIDER ADVOCACY FOR BUILDING YOUR DYNASTY AND LEAVING A LEGACY...

A good man leaveth an inheritance
to his children's children: and the
wealth of the sinner is laid up for
the just.

Proverbs 13:22

YOU WANT ME TO BE WHAT? A PROTECTOR?

What am I Getting Myself Into?



**YOU WANT ME TO BE WHAT?
A PROTECTOR?**

What am I getting myself into?

Short answer: Pretty much nothing. Someone - who knows, likes, and trusts you - is asking you to participate in one of the most important things they've ever done. They are establishing an **Estate Planning & Asset Protection Structure** to safeguard everything they have, and prepare to pass an inheritance to perpetual generations to come after them.

As we like to put it: ***Building a Dynasty & Leaving a Legacy.***

You've been tapped to serve as **Protector** for their two Trusts (*of which the person giving you this Document is the Beneficiary*). Frankly, it's a significant honor to be asked to play this role. Think of the Protector as a "safety net" and "stopgap." On the one hand, the Protector does have certain veto powers over the Trustee (*the party tasked with managing Trust assets*), though prudent selection of a Trustee makes this incredibly unlikely to be necessary. Other times, the Protector may act in concert with the Trustee where a notable decision is made (*such as change of jurisdiction or controlling law for the Trusts – again, very unlikely, but possible*). Of course, a well-chosen Trustee (*especially a well-trusted individual*) generally eliminates the need for the Protector to serve as a safety net (*or "check" on the Trustee's performance & decisions*).

Thus, on the other hand, the Protector's role as a stopgap can be thought of as a "dead end preventer." We like our **Estate Planning & Asset Protection Structures** to function as autonomous creations with internal controls and no need for outside intervention. Accordingly, the Protector is used to replace the Trustee if they ever resign, are removed, or otherwise cease serving as Trustee. This isn't difficult, and would likely be done while in full communication with the Beneficiary. This keeps the change "in-house," and prevents a court from having to be involved.

That's really about all there is to it. You'd doubtfully ever incur much of any expense and, if you did, those could be reimbursed by the Trust. As far as potential risk or liability, the Trust Documents expressly state that you are not liable for actions taken in good faith – so there's no exposure there. Moreover, you are free to resign at any time, simply by providing notice in writing to the Trustee and the Beneficiary.

SUMMARY: The Trusts provides for a **Trust Protector** with various oversight and veto powers. As the name suggests, the Trust Protector exists to safeguard ("protect") the Beneficiaries' interests in cases where a Trustee may be absent or the Trust Protector disagrees with certain actions/decisions a Trustee makes (*extremely unlikely*). The Trust Protector can remove/replace a Trustee, limit Trustee powers and/or veto certain Trustee actions/decisions, perform certain actions in the case of Primary Beneficiaries under age 25, and otherwise cover in certain cases where a Trustee is unavailable (*most likely by replacing an absent Trustee*).