

NEED TO KNOW WHAT TO DO NEXT?

Carlton Weiss is a legal beagle when it comes to ensuring our clients have every trust document one could ever need - either for business, public contracts or private affairs. It's the reason **we suggest reading every form's description given in the Content Directory.pdf** so you can familiarize yourself with what you have available at your fingertips.

If you have completed the training and read all the documents, you can follow this as a guide of what to do next. At this point, you should have:

- ☐ **Read and complete Trustee Secrets [SECTION 1]** and know how to operate as a trustee.
- ☐ **Setup Bulletproof Trust [SECTION 2]** by finding a friend/neighbor to be grantor (they can grant anything, even a pencil) and complete the documents below, in order of importance:
 - a. **Appointment of 2 Other Trustees** (completed within 30 days of Trust creation)
 - i. *Letter of Acceptance* (showing Trustees accept their appointment)
 - b. **Prepare Trust Minutes and Resolutions document for future use**
 - c. *Beneficial Interest Certificates* (Board of Trustees can revoke these at any time)
 - d. **Capital Interest Certificates** (to transfer assets into Trust as Trustee) allowing the exchange of assets for a non-par value (no value assessed) certificate which can be re-exchanged at any time by the trustee, returning the assets in whole or in part.
 - i. *Motor Vehicle Property Lease* (to place car into a separate Trust)
 - ii. *Property Management Agreement* (to place real estate into another Trust)
 - e. *Independent Contractor Agreement I or II* (to hire 1099 employees)
- ☐ **Create the Trust Web [SECTION 3]** for personal, business, vehicle(s) and other assets. The same (3) trustees and grantor can be used for ALL trusts in this trust web.
- ☐ **Opened a non-interest bearing Bank Account** for a C-Corp, LLC or Trust to be the "Operating Entity" who transacts with the public.
 - a. **Have/will begin indorsing checks** (even paying yourself with checks) **in lawful money**
 - b. Assignment (to deposit into Trust bank account as the employer) OR
 - c. Notice of Assignment (notice to employer to deposit into the Trust bank account)
- ☐ **File UCC-1 for Public Trust/Corporation (debtor) and Pass-Through Trust (creditor) and Private Security Agreement.**
 - a. Keep a **signed and completed but non-filed UCC-1** for Pass-Through Trust (debtor) and Holding/Master Trust (creditor) **and Private Security Agreement.**

Of course, there are more forms which have very specific purposes in the Legal Library, ensuring you find exactly what you need for your given situation. And remember to always use a dictionary for any words you may not understand!