PROTECT WEALTH
PROTECT WEALTH ACADEMY, INC.
SHIELD ASSETS, REDUCE TAXES, BUILD WEALTH

3-Day Asset Protection and Wealth Creation Summit

DAY 1

INTRODUCTION TO THE SUMMIT (9:00 – 9:50 am)
– *Don Pendleton, Host and Emcee*

A. Outline of the Summit
B. The Pillars of Financial Freedom
C. Introduction of Presenters
D. Instructions for Your Personal Strategy Sessions

HOW STRONG IS YOUR ASSET PROTECTION?
– *Clint Coons, JD* (9:50 am – 12:15 pm)
(Sign up for Your Legal Strategy Session during 10:30 am Break)

A. Understanding Asset Protection
1. Structuring for different asset classes
2. Recognizing activities that create liability
3. Insurance protection myth
4. Various legal threats faced by everyone

B. Asset Protection Solutions
1. Keeping real estate ownership private
2. How to transfer real estate without creating a paper trail
3. Structuring solutions that give complete control and privacy
4. Various legal structures for different investments

C. Latest Trends in Threats Facing Investors
1. Recent IRS probes and targets
2. How to minimize the target on your back

D. Putting it all Together Overview

LUNCH BREAK – *Ballroom to be locked* (12:15 – 1:30 pm)

ESTATE PLANNING – BEGIN WITH THE END IN MIND
– *Clint Coons, JD* (1:30 – 3:00 pm)

A. Probate Defined and Best Ways to Avoid it

B. The Living Trust Solution
1. A Brief History of Trusts
2. Parties to All Trusts
3. Irrevocable vs. Revocable Trusts
4. Living vs. Testamentary Trusts
5. Funding a Trust

C. Crucial Ancillary Documents to the Trust

D. Customizing Your Trust – When You Shouldn't be Your Own Attorney

E. Federal Estate Taxes
1. Estate Taxes Defined
2. Tools Commonly Used to Reduce the Size of an Estate
   a. Proper Gifting
   b. Estate Discounts from LLCs and FLPs
   c. Irrevocable Life Insurance Trusts (ILIT)
   d. Charitable Remainder Trusts (CRT)
   e. Family Foundations

F. State Mandated Inheritance or Death Taxes

G. Understanding the Marital Trust

RETIREMENT PLANNING – SELECTING AND MAXIMIZING THE BEST PLANS FOR YOU
– *Clint Coons, JD* (3:00 – 3:45 pm)

A. Simplifying the Types of Plans Available
1. IRAs: Traditional, Roth, SEP and SIMPLE
2. Corporate Pension Plans: 401(a), 401(b), 403(b)
3. Defined Benefit Plans

B. Which Plans Offer the Best Lawsuit Protection?
C. Avoid the Most Common Self-Dealing Pitfalls
D. Fund Your Business Using Your Retirement Plan
E. Flip Real Estate Using Qualified Funds
F. Using Leverage Inside Your Retirement Plan
G. Partnering with other IRAs, LLC, Corps, and Individuals

INVESTING IN TODAY'S REAL ESTATE MARKET
– *Aaron Adams* (4:00 – 6:00 pm)

A. RE Tips from a Multi-Millionaire RE Investor
B. US Markets with Double-Digit Appreciation and Cash Flow
C. Invest Passively to get up to a 20% Return
D. Predictable 8 to 12% Rents and Appreciation
E. Wraparound Mortgages and Seller Finance Strategies
F. Eliminate Repairs, Vacancies, and Tenant Problems
G. Wholesale and Flip to Begin Your RE Investing
H. Learn how YOU Could Qualify for a Free Property Tour *(Including Hotel, Meals, and Airfare)*

DAY 2

CORPORATIONS – KEYS TO INCOME TAX REDUCTION
– Clint Coons, JD (9:00 – 10:30 am)

A. General Purpose of a Corporation
B. Corporate Basics
1. Shareholders, Directors, and officers – Who does what?
2. C or S Corp Tax Status – Which one do you choose?

C. Steps for Setting up a Corporation
1. Articles of Incorporation
2. Bylaws and Initial Meetings
3. Tax ID Number and Tax Elections
4. Other Required Formalities

D. Legal Strategies Used to Pierce Your Corporation
E. Proper Maintenance of a Corporation
F. Importance of Corporate Formalities, Book Keeping, etc.
G. Choosing the Proper Jurisdiction to Incorporate

YES, YOU CAN HAVE MONTHLY INCOME FOREVER
– Mike Coval and Stacy Acevedo (10:45 – 12:15 am)

A. Use Warren Buffett's Favorite Strategy
B. Eliminate 95% of all Financial Risk
C. Learn Primary Strategy for all Stock Market Exchanges
D. Learn to Bring in a 2nd Income in Under 3 Minutes a Day
E. Learn the Only 3 Specific Investments You'll Ever Need
F. Learn how to Force a Brokerage to Loan You Money
G. Get Paid Upfront to Trade, Not After Your Close the Trade
H. Learn the Exact Steps to Protect Every Investment

LUNCH BREAK – *Ballroom to be open* (12:15 – 1:30 pm)
(Private Lunch with Aaron Adams for Qualified Investors)

REDUCING YOUR BUSINESS TAXES IN 2018
– Scott M. Estill, JD (1:30 – 2:30 pm)

A. Real Estate Deductions
B. Qualified Business Income Tax Planning
C. Asset Purchases (Section 179 and Bonus Depreciation)
D. New Strategies for Automobile Expenses
E. Understanding the "Lost Tax Deductions"
F. Interest Expense Deductions
G. Meals and Entertainment Expenses
H. Like-Kind Exchanges
I. The NEW Corporate Tax Rates
1. C-Corporations
2. S- Corporations
3. Personal Service Corporations

J. Real Estate Tax Planning

SUPERCHARGE YOUR INVESTMENTS
– Harold Goldman (2:30 – 3:45 pm)

A. Allow Your Money to Earn in 2 or 3 Places at the Same Time
B. Making Your Money Work Way, Way Harder Than You Do
C. Advanced Leveraging Strategies for Real Estate Investors
D. Earn Internal, External, and Eternal Rates of Return
E. Protect and Insure Your Investments Against Loss
F. Tax-Free Investing and Retirement; You Can Have Both
G. Understanding the Opportunity Costs of Investing
H. Bonus Information (During Consultations): Market Volatility Strategies, Long-Term Care Solutions, Social Security Maximization, Fractional Life Settlements and Much More…

(Sign up for Your Financial Strategy Session during 3:45 pm Break)

LAWSUIT PROTECTION – WHAT ARE TODAY'S THREATS and SOLUTIONS? (4:00 – 6:00 pm)
– Don Pendleton

A. Surviving America's Lawsuit Epidemic
B. Sources of Lawsuits – What are the Real Threats Today?
C. Limited Liability Instruments to Protect Assets
1. Basics of LLCs and Limited Partnerships (LPs)
2. General Partnerships vs. LPs
3. Understanding Charging Order Protection
4. Inside vs. Outside Liability
5. LPs vs. LLCs – Which One do I Use?
6. Manager-Managed vs. Member Managed LLCs
7. Single-Member (SMLLC) vs. Multi-Member LLCs
8. Tax Election Possibilities for Your LLC
9. How Many LLCs Do You Need?
10. Tax Advantages of Nesting SMLLCs Inside MMLLCs

DINNER BREAK – *Ballroom to be open* (6:00 – 7:30 pm)

GRANTS, LOANS AND SUBSIDIES FOR INVESTORS AND ENTREPRENEURS
– Chris Johnson (7:30 – 9:00 pm)

A. Understand the Myths and Reality about Grant Funding
B. Learn how Everyone (including you) Qualifies for Government Grants
C. 5 Ways Real Estate Investors use Grants and Subsidies
D. 15 Grants and Subsidies for RE Investors
E. Don't Pay for College. Go for FREE. Learn how
F. The Government Funding Agencies WANT to Send you the Money… ONLY 2 things you need to know to get it
G. Grant Funding STIMULATES the Economy — Stimulate YOUR Business!
H. Grant Funding Case Studies: RE / Business / Education

DAY 3

CONTINENTIAL BREAKFAST BONUS SESSION

HIGH PROFITS IN RESIDENTIAL ASSISTED LIVING HOMES (8:00 – 9:30 am)

– ***Gene Guarino,*** *Founder and CEO of RAL Academy*

- **A. Profit from the Massive Growth in the Senior Services Market**
- **B. Provide Your Family with Significant Ongoing Monthly Cash Flow**
- **C. Protect your Money from Economic Downturns, Market Crashes and Job Losses**
- **D. Discover the Explosive Investment Opportunity for the Next 25 Years**
- **E. How a Single-family Home Can Net you $10,000 per month or more!**

REDUCING YOUR PERSONAL TAXES IN 2018

– ***Scott M. Estill, JD*** (9:30 to 10:30 am)

- **A. Changes in Personal Tax Brackets**
- **B. Itemized vs. Standard Deduction**
- **C. Tax Planning for Personal Loans/Mortgages**
- **D. Changes to Tax Credits**
- **E. Alternative Minimum Taxes**
- **F. Affordable Care Act**
- **G. Roth IRA Conversions**
- **H. Tax Planning with Children/Family**
- **I. Qualified Business Income and Your Personal Taxes**
- **J. Estate Tax and Gifting Strategies**

INCOME TAX REDUCTION STRATEGIES

– ***Patrick James*** (10:45 am – 12:15 pm)

- **A. Become 100% AUDIT Proof - Never Fear the IRS!**
- **B. 99 Ways to Beat the IRS with a 3-Year Review**
- **C. Receive 1,000s of DOLLARS Back from the IRS that You Donated Over the Past 3 Years**
- **D. How to Track Your Expenses and Stay Organized**
- **E. Your Tax Preparer is Only as Good as the Information You Give Them.**
- **F. Learn How to Categorize Your Expenses the RIGHT way! - Save 50% (or more) on Your Taxes**
- **G. It's Your Money, Not Theirs. Only Pay What you Legally Owe and Not One Penny More**

LUNCH BREAK – Ballroom to be open **(12:15 – 1:30 pm**

(Private Lunch with Gene Guarino for Qualified Investors)

ETHICAL ISSUES OF ASSET PROTECTION

– ***Don Pendleton*** (1:30 – 2:00 pm)

- **A. Is it Okay to protect Your Family's Assets?**
- **B. When is Asset Protection Too Late?**
- **C. How Much Insurance Should You Carry?**
- **D. How to Avoid Fraudulent Transfers?**

CRITICAL TIES AND RELATIONSHIPS BETWEEN ENTITIES

– ***Don Pendleton*** (2:00 – 2:30 pm)

- **A. The Basic Structure of Asset Protection**
  1. How the Family Trust, the Corporation, and Limited Liability Entities Tie Together?
  2. Who Owns, Who Controls, and Who Gets Taxed?
  3. Properly Conveying Assets to a Legal Entity
- **B. Importance of Relationship Documents**
  1. Equipment and Real Estate Leases
  2. Management Agreements
  3. Intellectual Property Leases
  4. Royalty Agreements
  5. Personal Loans and Promissory Notes
  6. Promissory Notes
  7. Funding Your Business Interests into the Trust
- **C. Tax Implications of Money Transfers Between Entities**
- **D. Overview for Stock and Real Estate Investors**

CASE STUDIES AND ANALYSIS – TYING IT TOGETHER

– ***Don Pendleton*** (2:30 – 5:00 pm)

- **A. Case Studies**
  1. Married Couple, Small Estate, Low Risk
  2. Married Couple, Small Estate, Medium Risk
  3. Single Person, Medium Estate, Low Risk
  4. Single Person, Real Estate Investor, High Risk
  5. Married Couple, Small Estate, High Risk
  6. Married Couple, Medium Estate, High Risk
  7. Married Couple, Medium Estate, High Risk
  8. Married Couple, Large Estate, High Risk
- **B. Closing Comments and Analysis**

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