



PROTECT
WEALTH

LIVESTREAM

AUGUST 1-3, 2022

Registration & Information at:
ProtectWealth.com/Livestream

3-DAY ASSET PROTECTION AND WEALTH CREATION SUMMIT

DAY 1 - MONDAY, AUGUST 1

11am - 6pm ET / 10am - 5pm CT / 9am - 4pm MT / 8am - 3pm PT

INTRODUCTION TO THE SUMMIT

Don Pendleton – Host and Emcee, Author, President of Protect Wealth Academy

- A. How to Get Most Out of the Summit
- B. The Pillars of Financial Freedom
- C. Introduction of Presenters

HOW STRONG IS YOUR ASSET PROTECTION?

Clint Coons, Esq. – Asset Protection Attorney, Managing Partner of Anderson Business Advisors, Real Estate Investor

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. Transfer real estate without creating a trail
- 3. Structuring solutions for control and privacy
- 4. Legal strategies 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

MAXIMIZING YOUR RETIREMENT FUNDS

Jill Banner – CEO, iPlanGroup, Real Estate Investor

- A. What the Wealthy Are Investing in Today
- B. Using Qualified Funds for Real Estate Investments
- C. Why Consider a ROTH Conversion This Year?
- D. Choosing the Best Retirement Plans for You
- E. Avoid Common Self-Dealing Pitfalls
- F. Using Your Retirement to Fund Your Business
- G. Checkbook Control with Easy IRA LLC
- H. Avoid State Filing Fees with Business Trusts

HIGH PROFITS IN RESIDENTIAL ASSISTED LIVING HOMES

Isabelle Guarino – COO of RAL Academy, CEO RAL Nat'l Assoc., Real Estate Investor, Speaker/Trainer

Profit from the Massive Growth in the Senior Services Market

- A. Residential Assisted Living – What it is and How it Works
- B. Provide Your Family with Significant Ongoing Monthly Cash Flow
- C. Protect your Money from Economic Downturns, Market Crashes & Job Losses
- D. Discover the Explosive Investment Opportunity of the Next 25 Years
- E. Profit from the Massive Growth in Senior Care Services
- F. How a Single-family Home Can Net you \$10,000 per month or more!

FREE Gifts, Prizes, Handouts, and Giveaways will happen randomly throughout each day, so don't miss a Minute. Please Login and Test your system at least 15 minutes prior to the Summit each morning. BREAKS will be 10-minutes each hour and LUNCH will be 30-minutes.

DAY 2 - TUESDAY, AUGUST 2

11am - 6pm ET / 10am - 5pm CT / 9am - 4pm MT / 8am - 3pm PT

DOES YOUR ESTATE PLAN CREATE A LEGACY, OR A MESS?

Clint Coons, Esq. – Asset Protection Attorney, Managing Partner of Anderson Business Advisors, Real Estate Investor

- A. Probate Defined and How to Avoid it
- B. The Living Trust Solution
- C. Crucial Ancillary Documents to the Trust
- D. Unique Customization Options for Your Trust
- E. When You Shouldn't be Your Own Attorney
- F. Estate Planning Gone Bad
- G. Federal Estate Taxes
- H. State Inheritance & Death Taxes

USING A CORPORATION TO REDUCE YOUR INCOME TAXES – GET PAID TO TRADE!

Clint Coons, Esq. – Asset Protection Attorney, Managing Partner of Anderson Business Advisors, Real Estate Investor

- A. Using a Corporation to Reduce Your Taxes
- B. Gain Additional Deductions - Qualify as a "Trader"
- C. Save 15.3% by Separating Passive from Active Income
- D. Proper Maintenance for Your Legal Structure

CREATING MONTHLY INCOME FOREVER

Mike Coval and Stacy Acevedo – Millionaire Stock Market Trainers, Investors, Educators, Authors

- A. An Exclusive Strategy to Consistently Beat the Market
- B. Learn Warren Buffett's Favorite Strategy
- C. Eliminate 95% of all Financial Risk
- D. Learn the Only 3 Investments You'll Ever Need

- E. Learn Primary Strategy for all Stock Market Exchanges
- F. Learn to Bring in a 2nd Income in Under 3 Minutes a Day
- G. Learn How to Force a Brokerage to Loan You Money at 3.5%
- H. Learn the Exact Steps to Protect Every Investment

REDUCING YOUR BUSINESS TAXES IN 2022

Scott M. Estill, JD – Tax Attorney, Former Sr. Trial Attorney with the IRS, Author

- A. Potential Tax Changes for Businesses
- B. Tax Credits to Watch in 2022
- C. Purchasing Vehicles in Your Business
- D. Business Entity Choices (C vs. S)
- E. New Tax Breaks for C-Corporations
- F. New Limits on Retirement Contributions
- G. Qualified Business Income Tax Planning

LAWSUIT PROTECTION – WHAT ARE TODAY'S THREATS AND SOLUTIONS?

Don Pendleton – Host and Emcee, Author, President of Protect Wealth Academy

- A. Lawsuits – What are Today's Threats?
- B. Limited Liability Instruments
- C. Basics of LLCs & Limited Partnerships
- D. Understanding Charging Order Protection
- E. Inside vs. Outside Liability
- F. How Many LLCs Do You Need?
- G. Advantages of Nesting LLCs inside LLCs
- H. Tax Election Possibilities for Your LLC

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DAY 3 – WEDNESDAY, AUGUST 3

11am - 6pm ET / 10am - 5pm CT / 9am - 4pm MT / 8am - 3pm PT

REDUCING YOUR PERSONAL TAXES IN 2022

Scott M. Estill, JD – Tax Attorney, Former Sr. Trial Attorney with the IRS, Author

- A. Potential Tax Changes in 2022
- B. New Tax Breaks for Individuals
- C. Changes to Itemized Deductions
- D. Understand New Child Tax Credits
- E. Strategies to Reduce Your Tax Burden
- F. Real Estate Tax Strategies

ESSENTIALS OF ASSET PROTECTION

Don Pendleton – Host and Emcee, Author, President of Protect Wealth Academy

- A. Protecting Your Personal Residence
- B. Ethical Issues of Asset Protection
 1. Is it okay to protect your family's assets?
 2. When is asset protection too late?
 3. How to avoid fraudulent transfers?
- C. Critical Ties & Relationship Documents Between Entities
 1. Equipment and real estate leases
 2. Management agreements
 3. Intellectual property and leases
 4. Royalty agreements
 5. Personal loans and promissory notes
 6. Funding your business interests into the trust

INCOME TAX REDUCTION STRATEGIES

Patrick James – Tax Reduction Specialist, Author

- A. Become 100% AUDIT Proof – Never Fear the IRS!
- B. Receive 1,000s of DOLLARS You Donated to the IRS Over the Past 3 Years

- C. How to Track Your Expenses and Stay Organized
- D. Your Tax Preparer is Only as Good as the Information You Give Them
- E. Learn How to Categorize Your Expenses the RIGHT way!
- F. Pay What you Legally Owe – Not One Penny More!

INVESTING IN TODAY'S ECONOMY: TAXES & BUSINESS SUCCESS

Kevin O'Leary – Businessman & International Investor, TV Celebrity, Advocate for Small Business

- A. Where the Savvy Money is Going Today
- B. How Tax Planning Can Increase Your Wealth
- C. Wealth Building Strategies in Inflationary Times
- D. Which Business Structures Will Benefit You
- E. Capitalizing on Today's Global Fear
- F. Finding a Good Tax Strategist for You

SYNERGISTIC PLANNING – COMBINING ASSET, TAX & ESTATE STRATEGIES

Don Pendleton – Host & Emcee, Author, President of Protect Wealth Academy

- A. Fundamental Building Blocks of Asset Protection
- B. Real-World Estate Examples & Case Studies
- C. How Much Insurance Should You Carry?
- D. Creating & Funding Your Revocable Living Trust
- E. Which Assets Are Subject to Probate?
- F. Eliminate Estate Taxes & Avoid Probate

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