



PROTECT
WEALTH

LIVESTREAM

March 4-6, 2024

Registration & Information at:
ProtectWealth.com/Livestream

3-DAY ASSET PROTECTION & WEALTH CREATION SUMMIT

DAY 1 - MONDAY, MARCH 4

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. Overview of Asset Protection
- C. The Pillars of Financial Freedom
- D. 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. Shielding yourself from lawsuits and creditors
 - 2. Identifying activities that create liability
 - 3. Selecting best tax election for your business
 - 4. Spotting insurance games & myths
- B. Asset Protection Solutions
 - 1. Creating anonymity in your legal structure
 - 2. Structuring solutions for privacy & control
 - 3. Transferring real estate without a trail
 - 4. LLCs, Series LLCs, Land & Statutory Trusts
- C. Latest Trends in Threats Facing Investors
 - 1. Recent IRS probes and targets
 - 2. How to minimize the target on your back
- D. Legal & Tax Strategies for Different Asset Classes
- E. The New Corporate Transparency Act of 2024

MAXIMIZING YOUR RETIREMENT FUNDS

Jill Banner – CEO, iPlanGroup, Successful 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 & Prohibited Transactions
- F. Using Your Retirement to Fund Your Business
- G. Tax-Free Investing for Children & Grandchildren

PASSIVE REAL ESTATE INVESTING

Rob Fuller – COO, ROI Property Group, Millionaire Real Estate Developer/Investor

Nicole Fuller – Co-Founder, ROI Property Group, Fund Manager, Lead Designer

- A. Monthly Rewards with Minimum Effort
- B. Debt vs. Equity Investing – Which is Safer for You?
- C. Is There a Real Estate Bubble?
- D. Getting Fixed Rates of Return from a Debt Position
- E. Generating Income Without Landlord Hassles
- F. Receiving Consistent Monthly Returns

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, MARCH 5

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

USING A CORPORATION TO REDUCE YOUR INCOME TAXES

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

- A. Expenses That Are Only Deductible for a Business
- B. Selecting the Best Tax Method for Your Business
- C. How to Properly Maintain Your Legal Structure

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. 3 Reasons You Need a Trust
- B. The Living Trust Solution
- C. When You Shouldn't be Your Own Attorney
- D. Customization Options for Your Trust
- E. Estate Planning Gone Really Bad

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 to Bring in a 2nd Income in Under 3 Minutes a Day
- E. Learn How to Force a Brokerage to Loan You Money at 3.5%

FORWARD TAX PLANNING TO REDUCE YOUR 2023 & 2024 TAX LIABILITY

Gene Bott, CPA – Tax Advisor, Tax Planning Strategist
Chris Brown – President of Tax Hive, LLC

- A. Changes to the Tax Code in 2023
- B. Potential Changes to the Tax Code in 2024
- C. New Tax Breaks for Individuals
- D. Changes to Itemized Deductions
- E. Understanding Tax Credits (ERC, R&D, etc)
- F. Strategies to Reduce Your Tax Burden
- G. Real Estate Tax Strategies

LAWSUIT PROTECTION – WHAT ARE TODAY'S THREATS & 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 Defined
- D. Understanding Charging Order Protection
- E. Inside vs. Outside Liability
- F. How Many LLCs Do You Need?
- G. Proper Jurisdiction for Your LLC
- H. Advantages of Nesting LLCs inside LLCs



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DAY 3 – WEDNESDAY, MARCH 6

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

LIVE Q&A – ASK YOUR TAX QUESTIONS

Gene Bott, CPA – Tax Advisor, Tax Planning Strategist

Chris Brown – President of Tax Hive, LLC

- A. Opportunity to Ask Your Personal or Business Questions to a Tax Professional!
- B. What to do if the IRS Sends You a Letter?
- C. How are Tax Returns Selected for Audits?
- D. What Strategies Can You Implement Today to Impact Your 2023 Taxes?
- E. Potential Changes to the Tax Code in 2024?

ESSENTIALS OF ASSET PROTECTION

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

- A. Protecting Your Personal Residence
- B. Ethical Issues of Asset Protection

REDUCING PERSONAL TAXES IN 2023 & 2024

Patrick James – Tax Reduction Specialist, Author

- A. Your Tax Preparer is Only as Good as the Information You Give Them
- B. How to Categorize Your Expenses the Right Way
- C. Become 100% Audit Proof, Never Fear the IRS!
- D. Receive 1,000's of Dollars You Donated to the IRS over the past 3 years
- E. How to Track Your Expenses & Stay Organized
- F. Pay What You Legally Owe, Not One Penny More!

RICHER THAN A MILLIONAIRE – A PATHWAY TO TRUE PROSPERITY

Dr. William D. Danko – NY Times Best-Selling Author, *THE MILLIONAIRE NEXT DOOR*

Dr. Danko will discuss his Best-Selling books and the fundamental principles and strategies that lead to

true prosperity. Backed by 40 years of academic and consulting research on what it means to be truly rich, he'll share insights and specific details on what it takes to be Wealthy and Happy. He will also share his personal experience of applying the principles and teachings he learned from Protect Wealth Academy.

BUILDING BLOCKS OF ASSET PROTECTION

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

- A. The Basic Goals of Asset Protection Planning
 - 1. Isolating valuable assets
 - 2. Separating safe from dangerous assets
 - 3. Dividing passive from active income
 - 4. Creating a succession plan for your business
 - 5. Claiming all possible deductions
- B. Critical Leases, Agreements & Promissory Notes
- C. Creating & Funding Your Estate Plan
 - 1. Which of your assets are subject to probate?
 - 2. Do you really need a trust?
 - 3. Revocable vs. Irrevocable Trusts
 - 4. Living vs. Testamentary Trusts
 - 5. Crucial Ancillary Documents
- D. The New Corporate Transparency Act of 2024

CASE STUDIES

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

- A. Tying All the Tools Together for Your Synergistic Plan
- B. Combining Tax, Asset Protection, and Estate Planning
- C. Avoiding Federal Estate Taxes & Probate
- D. State Specific Death & Inheritance Taxes
- E. Community Property State Issues

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