



PROTECT  
WEALTH

# LIVESTREAM AGENDA

*This is only an sample agenda and is subject to change*

## 3-DAY ASSET PROTECTION AND WEALTH CREATION SUMMIT

### DAY 1

Event Times: 8:00am-3:00pm PT / 9:00am-4:00pm MT / 10:00am-5:00pm CT / 11:00am-6:00pm ET

#### 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

*Roberta Hudy – Self-Directed Retirement Planning*

1. Why consider a ROTH conversion this year?
2. Proposed Capital Gains Tax Increases
3. Choosing the Best Retirement Plans for You
4. Avoid Common Self-Dealing Pitfalls
5. Using Your Retirement to Fund Your Business
6. Using Qualified Funds for Real Estate Investments
7. Checkbook Control with Easy IRA LLC
8. Avoid State Filing Fees with Business Trusts

#### HOW TO BUILD WEALTH WITH STRATEGIC INVESTING

*Kwame Granderson, JD – Real Estate Attorney & Investor, Overseen Billions of Dollars in RE Transactions*

1. How to Find a Good Investment?
2. Why the Rich Invest?
3. How the Rich Invest?
4. Heat Path Investing & Tools
5. Disequilibrium Investing
6. Joint Venture Legal Structures
7. The Role of Hard Money Lenders
8. The Use of Debt in Investing
9. The Top 10 Questions to Ask When Investing

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

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## ACTIVE INVESTING PLANNING

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

- A. Analyzing the Proper Entity for Active Investing – LLC vs Corporation
- B. RE Professional vs. Dealer – How to be Both
- C. Flipping, Wholesaling, Wholetailing, and Airbnb – Setting it up Right
- D. Where You Should Create Your Entities
- E. Tax Reduction Hacks to Save You Thousands
- F. Legal Structures for Stock, Currency & Crypto Investors

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

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

- 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. Protect Your Trading Accounts from Lawsuits

## 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 2021

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

- A. Understand the “Build Back Better” Proposals
- B. Real Estate Tax Planning
- C. Qualified Business Income Tax Planning
- D. Understanding the “Lost Tax Deductions”
- E. Credits & Losses under CARES Act
- F. Like-Kind Exchanges

## 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 (LPs)
- D. Understanding Charging Order Protection
- E. Inside vs. Outside Liability
- F. Tax Election Possibilities for Your LLC
- G. How Many LLCs Do You Need?
- H. Advantages of Nesting LLCs inside LLCs

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# DAY 3

Event Times: 8:00am-3:00pm PT / 9:00am-4:00pm MT / 10:00am-5:00pm CT / 11:00am-6:00pm ET

## REDUCING YOUR PERSONAL TAXES IN 2021

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

- A. What's Included in December 2020 Stimulus Bill
- B. Time to Plan for Tax Increases in 2022
- C. New Rules for Charitable Donations
- D. New Tax Strategies You Can Implement Immediately
- E. Retirement Tax Planning under CARES Act
- F. Qualified Business Income and Personal Taxes

## 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!

## 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.

## SYNERGISTIC PLANNING – COMBINING ASSET, TAX & ESTATE STRATEGIES (2+2+2=99)

*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. Creating & Funding Your Revocable Living Trust
- D. Which Assets Are Subject to Probate?
- E. Asset Protection & Tax Reduction at Every Step
- F. Eliminate Estate Taxes & Avoid Probate
- G. Closing Comments & Analysis

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