

Asset Protection

Building wealth can take a lifetime, but losing it can occur in the blink of an eye. Without careful planning, many threats can cause financial harm to your spouse, your children, or your other heirs.

If something happened to you, would your spouse or children be able to manage the potential risks that go along with your property? Are there any debt balances? Any creditors that might want to be paid? Any injury lawsuits that could be filed? If any of your heirs have been divorced, could their exes walk away with part of their inheritance? Are any of your children (or their spouses) irresponsible with money? Would any of them have “plans” for their inheritance that give you concern? Are there any substance abuse concerns in the family? Do you own any property where people could get hurt? Would your family be able to get full value for your assets within the nine-month time frame they will have to pay estate taxes? What if you were to die during a market correction and your family had to sell assets or liquidate investments in a down market to pay taxes?

Many families have failed to consider the very real threats that could put the inheritance of their spouse or children at risk to creditors, law suits, or even extended family members. What risks could threaten your spouse’s or your children’s inheritance? What if you could create a source of cash for your spouse or children that was outside the reach of creditors?

The Proprietary Organization strategies we provide is a sure and safe road to freedom providing the ultimate in tax advantages, asset protections, and privacy. Our Proprietary Trust Organization strategies have been one of the best-kept secrets of wealthy, financially sophisticated Americans for years. Now they are available to everyone. Let’s discuss and you can decide if any of our strategies might be of interest to you.

