

**Sagacious Asset Protection  
Trust Education 2  
The Trust Deed**

**DISCLAIMER**

The information shared in this presentation is for information and education purposes only, and must not be taken as personal advice or a recommendation.

Due to the extensive nature of information relating to Trusts what we share in this presentation is an overview and must not be construed as being complete or entire.

It does not take into account your personal circumstances needs, requirements or financial objectives.



**Sagacious Asset Protection**



**Review: The Parties to a Trust**

**Settlor**

**Trustees**

**Beneficiaries**

**Executive Manager**

**Protector**

**The Premier Trust**



**What is a Trust Deed**

A Trust Deed is a legal document that sets out the **'Rules and Regulations'** for creating and managing your trust.

It must be signed and dated by the **Settlor** (who creates the Trust) and the **Trustees** who manage and administer the Trust.

## The Premier Trust



Who is Responsible for creating the Trust Deed?

**The Settlor**

## The Premier Trust



What information is included in a Trust Deed

**Definitions\***

**Name of the Trust**

**Authorization**

**Location**

**Nature of the Trust**

**Intent and Purpose of the Trust**

**Irrevocability and Duration**

*Plus*

## The Premier Trust



The Detailed Provisions for all Appointments

**Settlor**

**First Trustee**

**Second Trustee**

**Successor Trustee**

**Board of Trustees**

**Protector**

**Beneficiaries**

*Plus*

## The Premier Trust



The Trust Deed will also include

The detailed  
**Terms, Conditions, and Provisions**  
for administering and managing the Trust.

**Privacy is Paramount!**