

Sagacious Asset Protection
Trust Education 4
What to Place into a Trust

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

Trustees



Review: What sort of person makes a good Trustee?

- 1. They Have a Trust.**
- 2. You Trust them.**
- 3. They possess a sense of responsibility to their appointment.**
- 4. Understand the requirement for Confidentiality & Privacy.**
- 5. Can make decisions for the sole benefit of the Beneficiaries.**
- 6. Prepared to devote some time to gain knowledge and understanding to manage and administer the Trust.**

What to Place in Your Trust



**Legally speaking any lawful item
may be placed into a Private Trust.**

However, practical considerations must apply.

**The following considerations are
designed to assist you make the best decision.**

What to Place in Your Trust



Does it have Intrinsic Value?

What to Place in Your Trust



**Will it keep its value
or better still will it increase in value?**

What to Place in Your Trust



Do I want to sell it before I die?

What to Place in Your Trust



Does it create a cash flow?

What to Place in Your Trust



Is it a valuable collectable?

What to Place in Your Trust



Do my Beneficiaries want to use it?

What to Place in Your Trust



Can the item be easily converted to cash?

What to Place in Your Trust



Will it provide me with a ‘safety net’?

What to Place in Your Trust



It is therefore important to select the appropriate **Trust/s to enable you to achieve your objectives.**

The Trust Fund Register



The transactions of all items placed into the Trust and all consequential settlements must be recorded in the **Trust Fund Register**

The Trust Fund Register



The responsibility to maintain and keep the **Trust Fund Register accurate and up to date lies with the **Board of Trustees****



Categorises '*Stuff*' placed into the Trust

Personal Property

Real Property

Assets

Insurances