



The Trust Starter Blueprint

Build • Shield • Transfer

Powered by LadderUp, a DAE Capital Holdings Company

What is a Trust?

A Trust is a legal structure that allows a third party (the trustee) to hold and manage assets on behalf of a beneficiary. Think of it as a protective container—one that helps you pass down your assets, control how they're used, and avoid court delays and legal risks. You don't need to be wealthy to use a Trust. You just need to be smart enough to protect what you're building.

Six Reasons to Start a Trust Now

1. Real Estate & Probate Protection

Holding real estate in a trust avoids probate court—saving time, fees, and public exposure. Your property transfers smoothly to your loved ones.

2. Business Continuity & Protection

Place your business into a trust and control how it continues if you're unable to manage it. Avoid chaos or shutdowns after unforeseen events.

3. Tax Efficiency

Smart trust structures can lower estate taxes and defer capital gains, keeping more money in your pocket and your family's future.

4. Privacy & Anonymity

Wills become public record. Trusts remain private, shielding your assets, beneficiaries, and decisions from public view.

5. Smooth Asset Transfer

Whether it's property, cash, crypto, or business equity—define how and when assets are passed down, without courts or conflict.

6. Lawsuit & Creditor Protection

Certain trust structures shield your assets from creditors, lawsuits, and personal liability—building a firewall around your legacy.

What Can You Put in Trust?

- Real Estate (homes, rental properties, land)
 - Business Ownership (LLCs, shares, IP)
 - Cryptocurrency & Digital Assets
 - Life Insurance Policies
- Investment Accounts & Bank Accounts
- Vehicles, Personal Property, and More

How LadderUp Helps You Set It Up

Our team, with our partnerships, walk you through the Trust process—plain and simple. From selecting the right type of trust to structuring it for your business, family, and future. You don't need to be wealthy. You just need to be ready.

- ✓ One-on-one guidance
- ✓ Smart templates and custom options
- ✓ Secure structure for real estate, crypto, or business assets
- ✓ Step-by-step setup via your LadderUp dashboard

Ready to Protect What You're Building?

Before you contact LadderUp, take a few moments to think through the following:

- ☐ **Do you own any real estate** you want to pass down or protect?
- ☐ **Do you run a business or side hustle** that should keep operating if you can't?
- ☐ **Do you have children or dependents** who need access to your assets?
- ☐ **Do you hold crypto, stocks, or digital assets** that require secure transfer planning?
- ☐ **Do you want to avoid probate court** and keep your affairs private?
- ☐ **Do you have a life insurance policy** or plan to get one for your family's future?
- ☐ **Would you want certain assets to transfer immediately** without court delays?
- ☐ **Do you care who manages your assets** and how they're used if you're not around?

💡 *You don't need all the answers, just a willingness to protect what matters. We'll guide you through the rest.*

✉ Visit <https://ladderup.us/trust-systems> or email info@ladderup.us to book your trust strategy session today.