

ASSET PROTECTION TRUST SELF-ASSESSMENT QUESTIONNAIRE

1. What's Your Goal / Why are you interested in establishing a trust or multiple trusts?

2. Please give a brief explanation of your business experience:

2. In a Trust, you must Share Control over the Assets you wish to have protected. The assets are shared to others you "Trust" for limited specific enumerated ways (meaning, they can't just do anything with it or use it as their personal asset, that would be illegal). Make a list of possible friends/family who you would consider on your trust, and rate them on a scale of 0-10 in the following categories:

Name	Trustworthiness	Intelligence (Language/ Writing Skills/Legal Understanding)	Organizational Diligence	Other Skills: accounting/secretary/management skills (use of word processor, quickbooks, turbo tax, etc)

So now pick the best candidate from above, and to go into more detail, MAKE SURE THAT YOUR SELECTED CANDIDATES HAVE STRONG SKILLS IN THE FOLLOWING AREAS:

- | | |
|--------------------------------|---|
| 1) Accounting y / n | 2) Legal Understanding y / n |
| 3) Language Skills y / n | 4) Writing Skills y / n |
| 5) Computer Literacy y / n | 6) Filing out Tax/Government/Legal Forms y / n |

6) A Lifelong Learner – Willingness to Continue to Educate Oneself y / n

AND, ALTHOUGH NOT NECESSARY IT IS GOOD TO CONSIDER SOMEONE WHO HAS THE FOLLOWING:

7) Business Experience for 3+ Years y / n 8) Investment Knowledge y / n

9) Experience with Financial Institutions (opening bank accounts, taking out loans/mortgages, brokerage/investment accounts, including opening and maintaining International bank accounts, offshore gold storage, etc) y / n

10) Have a Good Credit Worthiness as Personal Guarantor for Loans for the Trust y / n

11) Have Connections/Colleagues y / n

12) Be at least 35 Years of Age to have necessary Wisdom, Maturity, and Life Experience y / n

AND YOU MUST Constantly Reading Books on Trusts:

Have you read Weiss’s Conside Trustee Handbook? y / n

The Art of Passing the Buck? y / n

ASSET QUESTIONS:

How much would you say is your total assets/net worth ? _____

How many different properties (real estate) do you have? _____

Are you a U.S. Citizen? _____

Do you have any Family/Relatives that are NOT U.S. Citizens? _____

Are you looking to take the TRUST offshore to another jurisdiction for further protection? _____

Please list the KINDS of property you have that you wish to protect (shares of stock, cash, bank accounts, bonds, gold/silver, real estate in the U.S., real estate out of the U.S., cars, boats, etc):

PROPERTY DESCRIPTION	WHOSE NAME THAT IS IN

SELECTION OF PARTIES TO THE TRUST #1:

Grantor:	Trustee:	Beneficiaries:

ADDITIONAL TRUSTS (IF NECESSARY):

SELECTION OF PARTIES TO THE TRUST #2:

Grantor:	Trustee:	Beneficiaries:

Initial Property (full description): _____

SELECTION OF PARTIES TO THE TRUST #3:

Grantor:	Trustee:	Beneficiaries:

Initial Property (full description): _____

SELECTION OF PARTIES TO THE TRUST #4:

Grantor:	Trustee:	Beneficiaries:

Initial Property (full description): _____

SELECTION OF PARTIES TO THE TRUST #5:

Grantor:	Trustee:	Beneficiaries: