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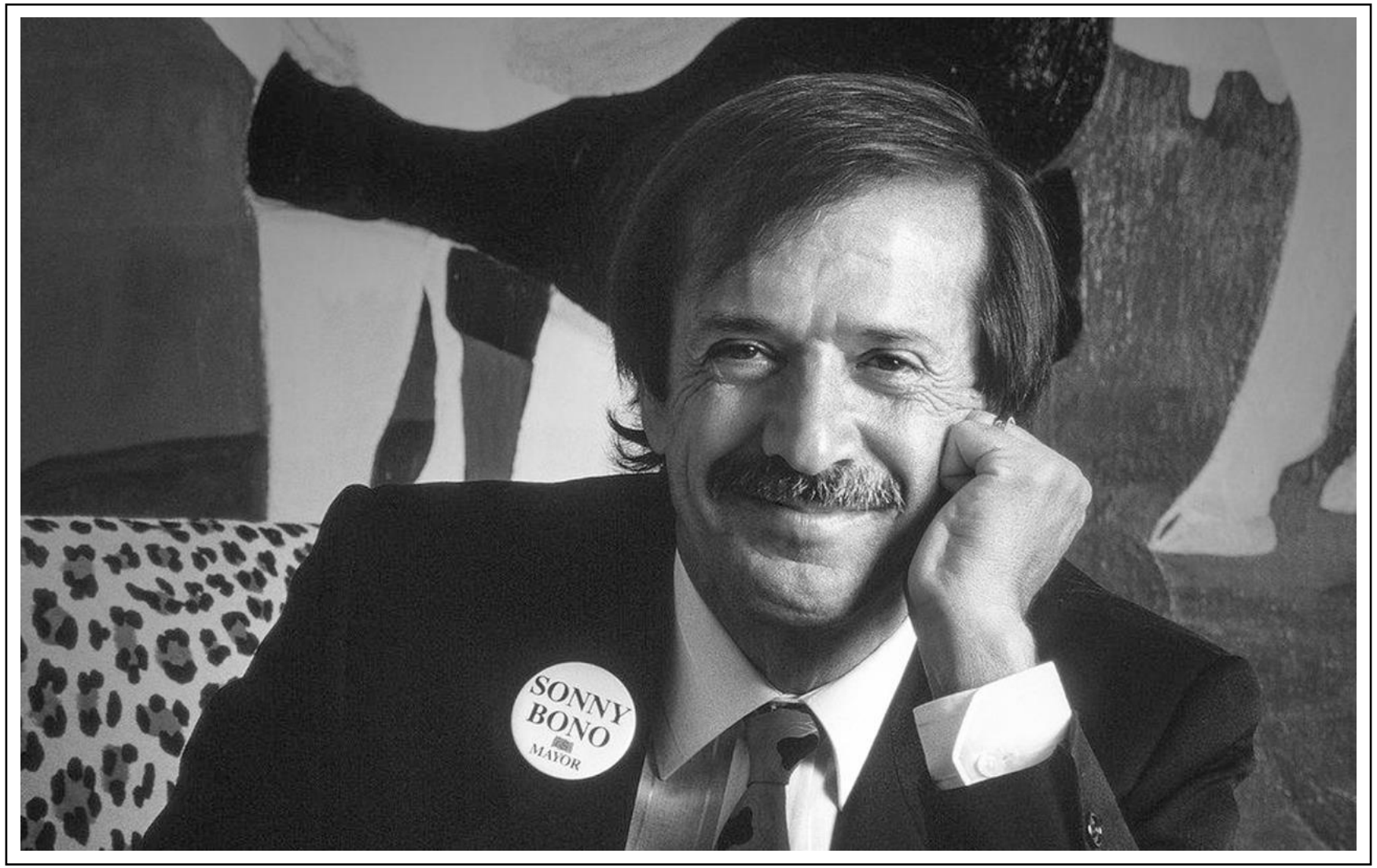
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CHECKLIST



- **Please Fill Out The Green Evaluation Sheet During the Presentation**
- **If You Need to Take a Call, Please Step Outside, We Understand There Are People Who Need You**
- **Restroom Locations**
- **Please Write Your Questions on The Information Handout**

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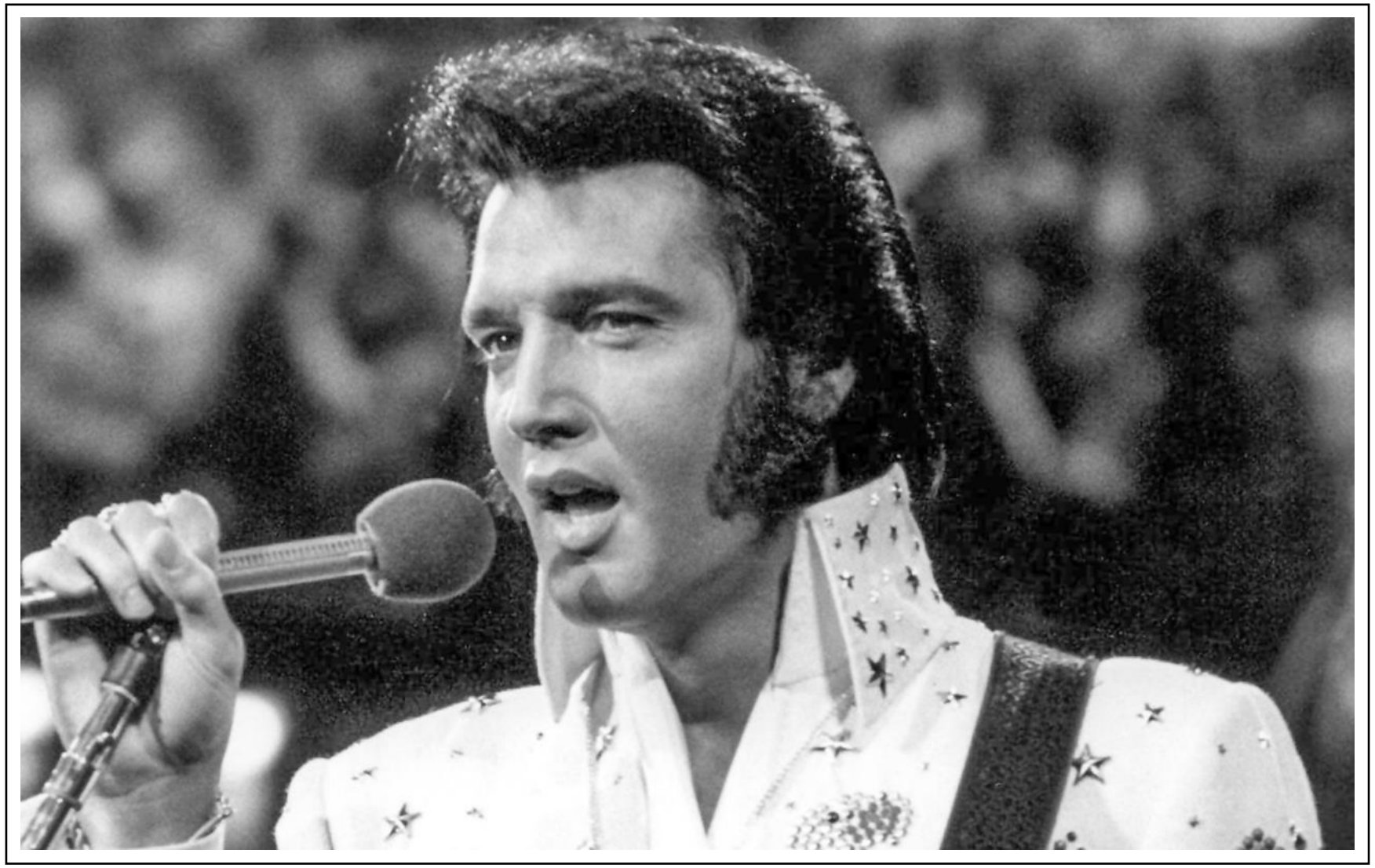
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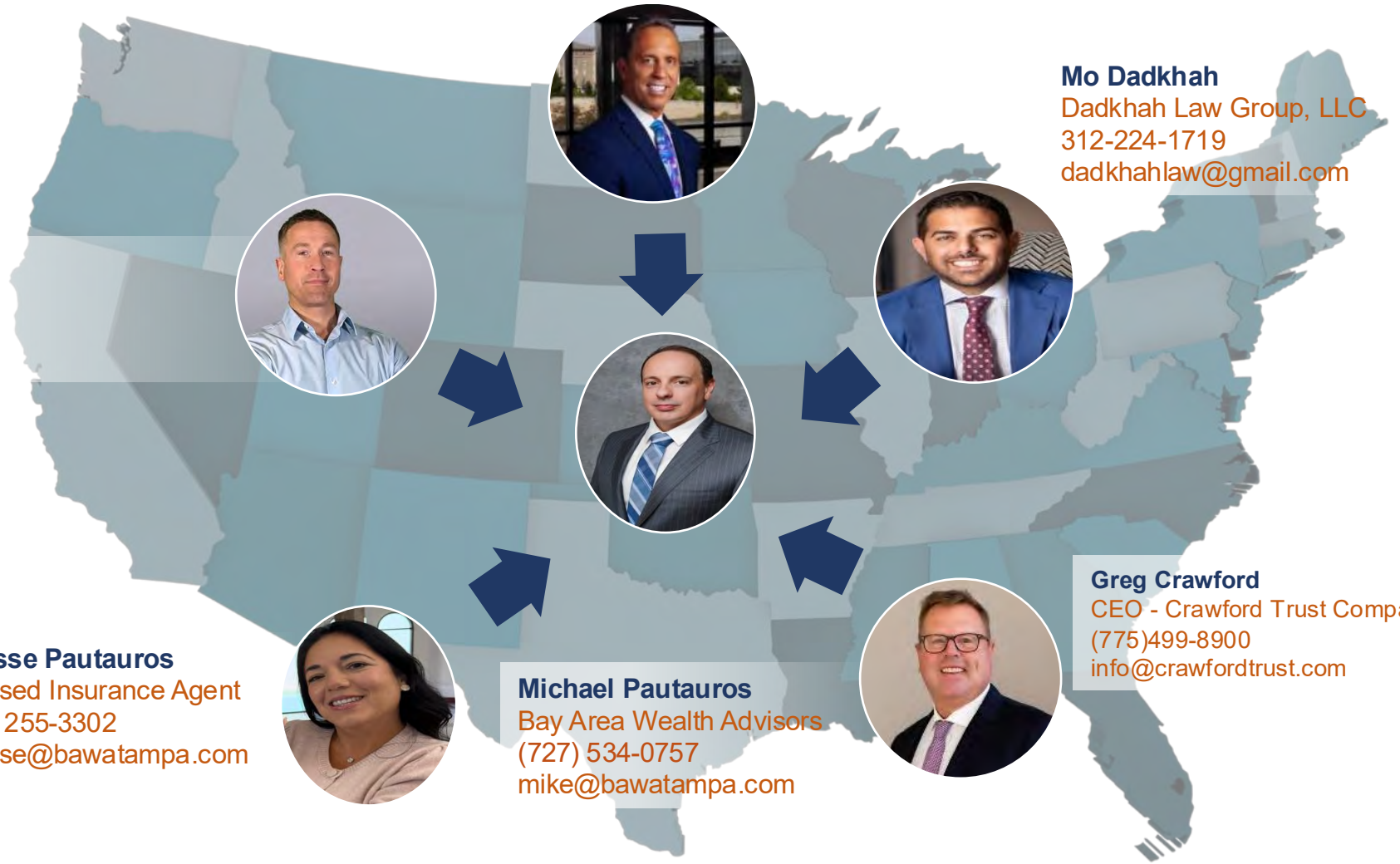
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OUR TEAM

Dedicated Experts with Over 250 Years of Combined Experience



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Founder Premiere Estate & Income Planning
952-829-1575

Mo Dadkhah
Dadkhah Law Group, LLC
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dadkhahlaw@gmail.com

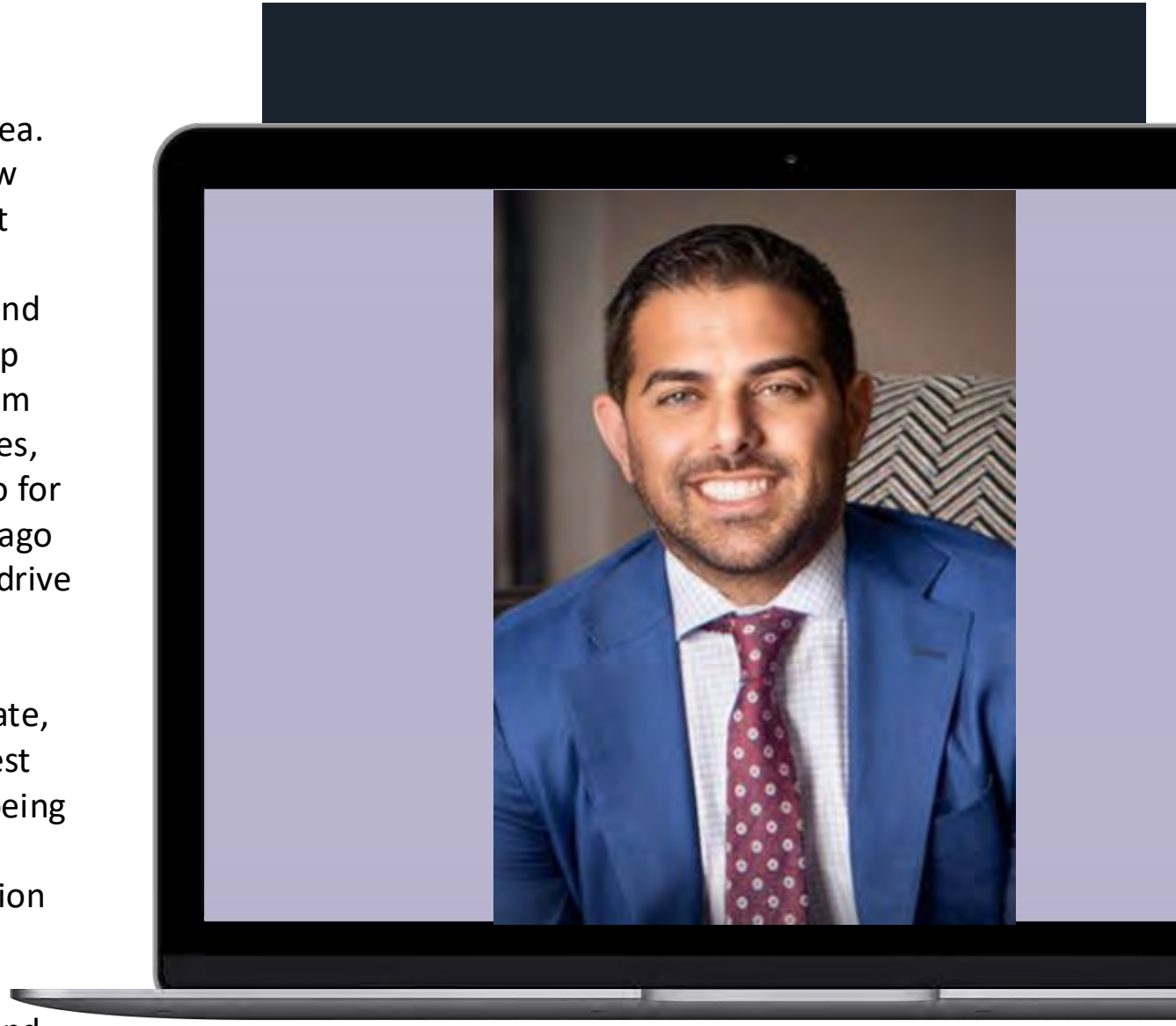
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Mo Dadkhah



Mo Dadkhah is an attorney born and raised in the Chicagoland area. Mo graduated law school in 2009 and immediately started his Law Practice and Law Firm. He is also the broker owner of Main Street Real Estate Group and for the last fifteen years has focused his attention (and practices) primarily on real estate, corporate law and estate planning. Mo has been named a Top 50 Attorney by the Top 100 Magazine, a Power Player by Chicago Scene magazine, his Firm has been selected as an Inc. 5000 list of fastest-growing companies, and he has been named as a Chicago Agent Magazine Who's Who for seven consecutive years. He has also held board seats at the Chicago Association of Realtors and been the host of WGN's Market Overdrive radio show.

Mo brings a wide range of knowledge in estate planning, real estate, and corporate law together to best guide his clients on how to best protect themselves in a complete manner. He prides himself on being honest and transparent, while caring for every client's needs no matter how large or small their concerns are. Every client's situation is important and all their questions/concerns matter.

In his free time Mo loves competing in auto racing, martial arts, and spending time with his family.

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GET READY TO LEARN...

- **What happens if there is no legacy in place?**
- **7 Everyday Situations That Can Lead to Emotional and Tragic Results... and How to Prepare for Them**
- **How to Write the "Ultimate Love Note" to Your Family?**
- **How to Develop a Tax-free Income**
- **How to Potentially Lower or Eliminate Taxes on Your Social Security Benefits**

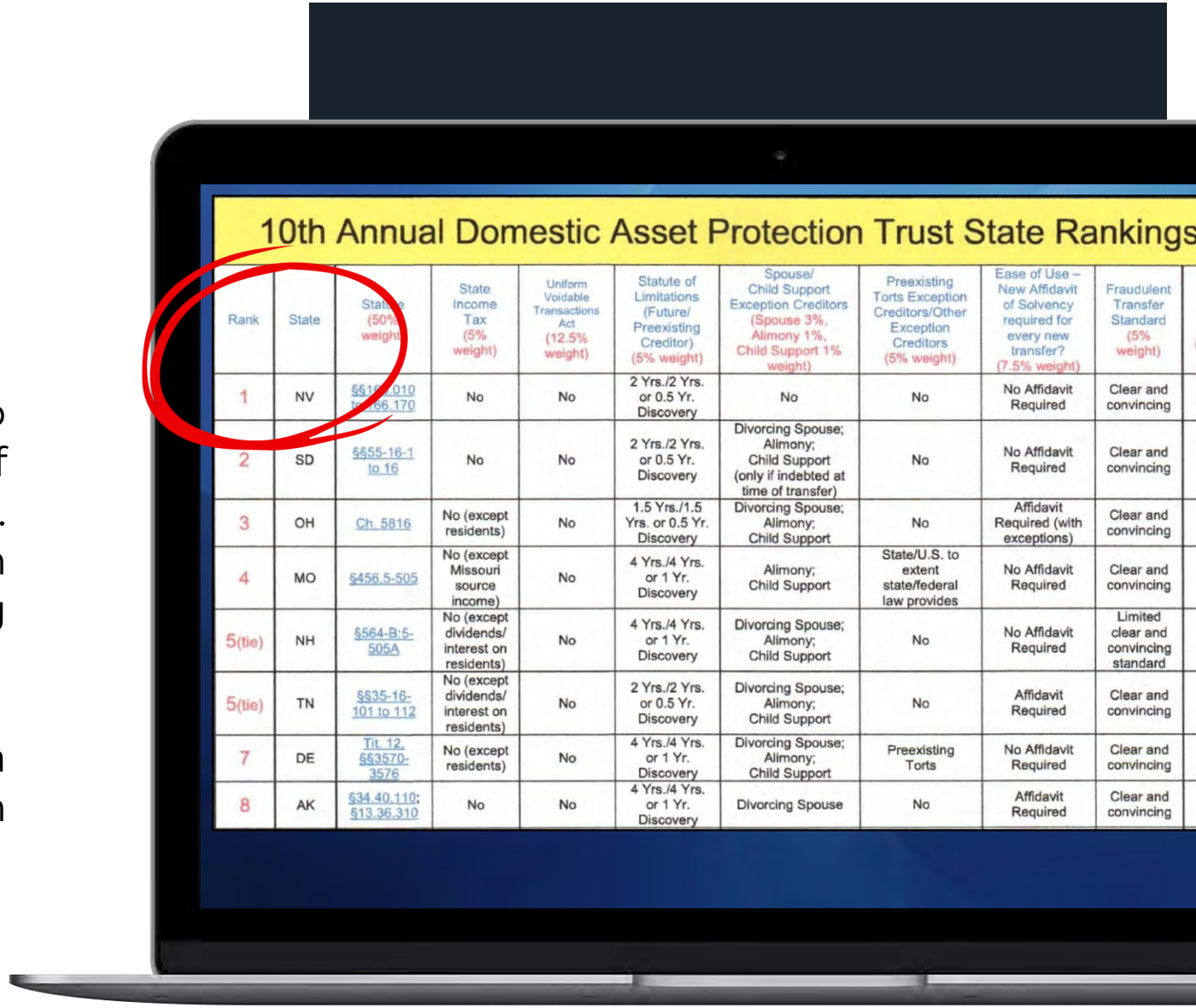
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AND ...

NEVADA TRUST LAWS

NO exception creditors. You can keep your money out of the hands of creditors with preexisting tort claims. In other states, these creditors can reach into DAPTs without providing fraudulent transfer.

(Note: All states let creditors pierce a trust to get at the money if they can prove fraudulent transfer.)



10th Annual Domestic Asset Protection Trust State Rankings

Rank	State	Statute (50% weight)	State Income Tax (5% weight)	Uniform Voidable Transactions Act (12.5% weight)	Statute of Limitations (Future/ Preexisting Creditor) (5% weight)	Spouse/ Child Support Exception Creditors (Spouse 3%, Alimony 1%, Child Support 1% weight)	Preexisting Torts Exception Creditors/Other Exception Creditors (5% weight)	Ease of Use – New Affidavit of Solvency required for every new transfer? (7.5% weight)	Fraudulent Transfer Standard (5% weight)
1	NV	§§166.010 to 166.170	No	No	2 Yrs./2 Yrs. or 0.5 Yr. Discovery	No	No	No Affidavit Required	Clear and convincing
2	SD	§§55-16-1 to 16	No	No	2 Yrs./2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support (only if indebted at time of transfer)	No	No Affidavit Required	Clear and convincing
3	OH	Ch. 5816	No (except residents)	No	1.5 Yrs./1.5 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	Affidavit Required (with exceptions)	Clear and convincing
4	MO	§456.5-505	No (except Missouri source income)	No	4 Yrs./4 Yrs. or 1 Yr. Discovery	Alimony; Child Support	State/U.S. to extent state/federal law provides	No Affidavit Required	Clear and convincing
5(tie)	NH	§564-B:5-505A	No (except dividends/ interest on residents)	No	4 Yrs./4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	No Affidavit Required	Limited clear and convincing standard
5(tie)	TN	§§35-16-101 to 112	No (except dividends/ interest on residents)	No	2 Yrs./2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	Affidavit Required	Clear and convincing
7	DE	Tit. 12, §§3570-3576	No (except residents)	No	4 Yrs./4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	Preexisting Torts	No Affidavit Required	Clear and convincing
8	AK	§34.40.110; §13.36.310	No	No	4 Yrs./4 Yrs. or 1 Yr. Discovery	Divorcing Spouse	No	Affidavit Required	Clear and convincing

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10th Annual Domestic Asset Protection Trust State Rankings

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8	AK	§34.40.110; §13.36.310	No	No	4 Yrs./4 Yrs. or 1 Yr. Discovery	Divorcing Spouse	No	Affidavit Required	Clear and convincing

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11th Annual Domestic Asset Protection Trust State Rankings Chart

Rank	State	Statute (50% weight)	Uniform Voidable Transactions Act (12.5% weight)	Statute of Limitations (Future Creditor) (2.5% weight)	Statute of Limitations (Preexisting Creditor) (2.5% weight)	Spouse/ Child Support Exception Creditors (Spouse 3%, Alimony 1%, Child Support 1% weight)	Preexisting Torts Exception Creditors/Other Exception Creditors (5% weight)	Ease of Use – New Affidavit of Solvency required for every new transfer? (7.5% weight)	Fraudulent Transfer Standard (10% weight)	Decanting State Ranking (5% weight)	Total Score
1	NV	§§166.010 to 166.170	No	2 Yrs.	2 Yrs. or 0.5 Yr. Discovery	No	No	No Affidavit Required	Clear and convincing	Ranked #2	99
2	SD	§§55-16-1 to 16	No	2 Yrs.	2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support (only if indebted at time of transfer)	No	No Affidavit Required	Clear and convincing	Ranked #1	98
3	OH	Ch. 5816	No	1.5 Yrs.	1.5 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	Affidavit Required (with exceptions)	Clear and convincing	Ranked #6	85
4	MO	§456.5-505	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Alimony; Child Support	State/U.S. to extent state/federal law provides	No Affidavit Required	Clear and convincing	Ranked #7	84.5
5	CT	Public Act No. 19-137	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support (only if indebted at time of transfer)	Preexisting Torts	No Affidavit Required	Clear and convincing	None	84
6(tie)	DE	Tit. 12, §§3570-3576	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	Preexisting Torts	No Affidavit Required	Clear and convincing	Ranked #3	83.5
6(tie)	TN	§§35-16-101 to 112	No	2 Yrs.	2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	Affidavit Required	Clear and convincing	Ranked #4	83.5
8	AK	§34.40.110; §13.36.310	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Divorcing Spouse	No	Affidavit Required	Clear and convincing	Ranked #8 (tie)	82.5
9	RI	§18-9.2	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	Preexisting Torts	No Affidavit Required	Clear and convincing	Ranked #14	82
10	IN	§30-4-8	No	2 Yrs.	2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Child Support	Property listed on app. to obtain credit – but only as to that lender	Affidavit Required	Clear and convincing	Ranked #10 (tie)	80.5
11	NH	§564-B:5-505A	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	No	No Affidavit Required	Limited clear and convincing standard	Ranked #5	79
12	WY	§§4-10-502, 504, 506(c), 510-523	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Child Support	Property listed on app. to obtain credit – but only as to that lender	Affidavit Required	Clear and convincing	Ranked #13	78
13	MI	§§700.1041 to 700.10502	Yes	2 Yrs.	2 Yrs. or 1 Yr. Discovery	Divorcing Spouse	No	Affidavit Required (with exceptions)	Clear and convincing	Ranked #25 (tie)	75
14	MS	§§91-9-701 to 91-9-723	No	2 Yrs.	2 Yrs. or 0.5 Yr. Discovery	Divorcing Spouse; Alimony; Child Support	Preexisting Torts, State/ Criminal Restitution/ Up to $1.5MM if no $1MM Umbrella Policy	Affidavit Required	Clear and convincing	None	72.5
15	HI	§554G	No	2 Yrs.	2 Yrs. Pers. Injury; 6 Yrs. Contract	Divorcing Spouse; Alimony; Child Support	Preexisting Torts/ Certain Lenders/ Hawaii Tax	No Affidavit Required	Limited clear and convincing standard	None	72
16	UT	§25-6-502	Yes	None	2 Yrs. or 1 Yr. Discovery (also 120-day mailing/ publication option)	No	No	Affidavit Required	Missing clear and convincing standard	None	60
NR	OK	Tit. 31, §§10 to 18	No	4 Yrs.	4 Yrs. or 1 Yr. Discovery	Child Support	Must be majority Oklahoma assets	No Affidavit Required	Clear and convincing	None	NR
NR	VA	§64.2-745.1; §64.2-745.2	No	None	5 Yrs.	Child Support	Creditor who has provided services to protect trust/ U.S./city, etc.	No Affidavit Required	Clear and convincing	Ranked #16 (tie)	NR
NR	WV	§44D-5-503A; §44D-5-503B	No	None	4 Yrs.	No	No	Affidavit Required	Missing clear and convincing standard	None	NR

*11th Annual Domestic Asset Protection Trust State Rankings Chart created in April 2020. Original State Rankings Chart created in April 2010.

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*The Decanting State Ranking column is based on the 7th Annual Trust Decanting State Rankings Chart (Jan. 2020) at http://www.oshins.com/state-rankings-charts.

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11th Annual Domestic Asset Protection Trust State Rankings Chart

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8 Reasons Nevada Is A Leading Trust Situs

(April 18, 2016, 5:36 PM EDT)

Nevada has been at the forefront in providing trust, tax and related fiduciary services nationally. To a large extent, this is on account of its favorable trust and asset protection laws, coupled with a legislature consistently committed to enacting cutting-edge provisions and updates. With growing taxes and heightened reporting requirements on both U.S. and non-U.S. trusts, Nevada increasingly has become a leading domestic — as well as global — trust situs. So what precisely are these advantages that Nevada law confers?



Neil E. Schoenblum

1. Dynasty Trusts

Many states, such as California, adhere to the rule against perpetuities as spelled out in the Uniform Statutory Rule Against Perpetuities (USRAP). Under the standard version of USRAP, trusts generally can have a life in the range of 90 years. By way of contrast, a trust administered under Nevada's version of USRAP can last for 365 years. While a good number of wealth holders wish to hold in trust substantial wealth for the benefit of future generations, with the standard 90-year USRAP limit this is severely limited. Furthermore, this shorter term also limits the ability of the trust to accumulate wealth free of federal estate and generation-skipping taxes. For example, suppose spouses collectively transfer $10 million at their deaths to a dynasty trust. There should be no federal estate tax. The assets can then grow in the trust for 365 years, four times longer than the standard USRAP 90 years, with future generations paying no such taxes on their deaths, but receiving distributions along the way as the need arises. The wealth that can be accumulated for the family's benefit freed of federal gift, estate and generation-skipping transfer taxes for 365 years could prove staggering.

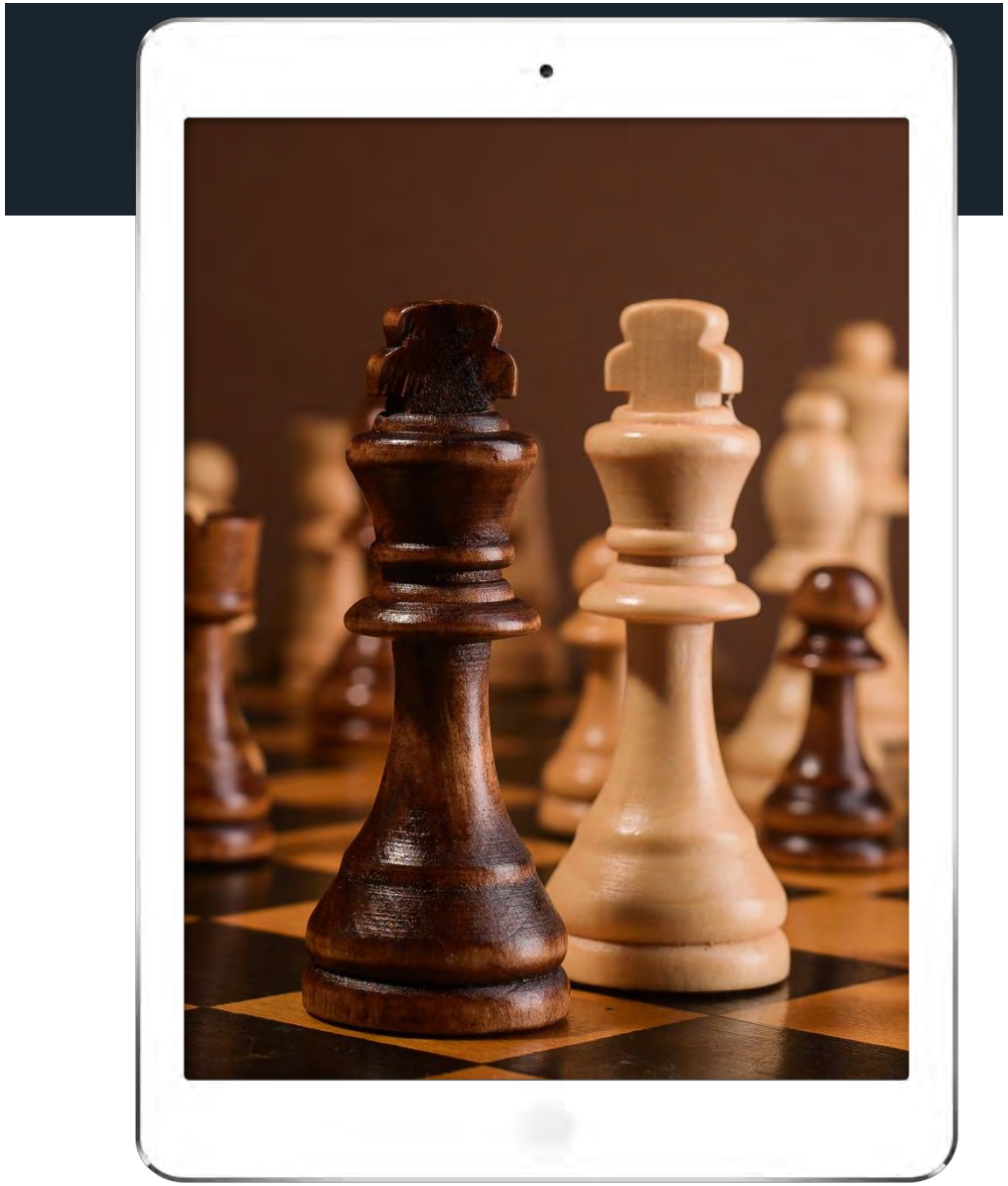
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1. ESTATE PLANNING STRATEGIES: WILL OR TRUST

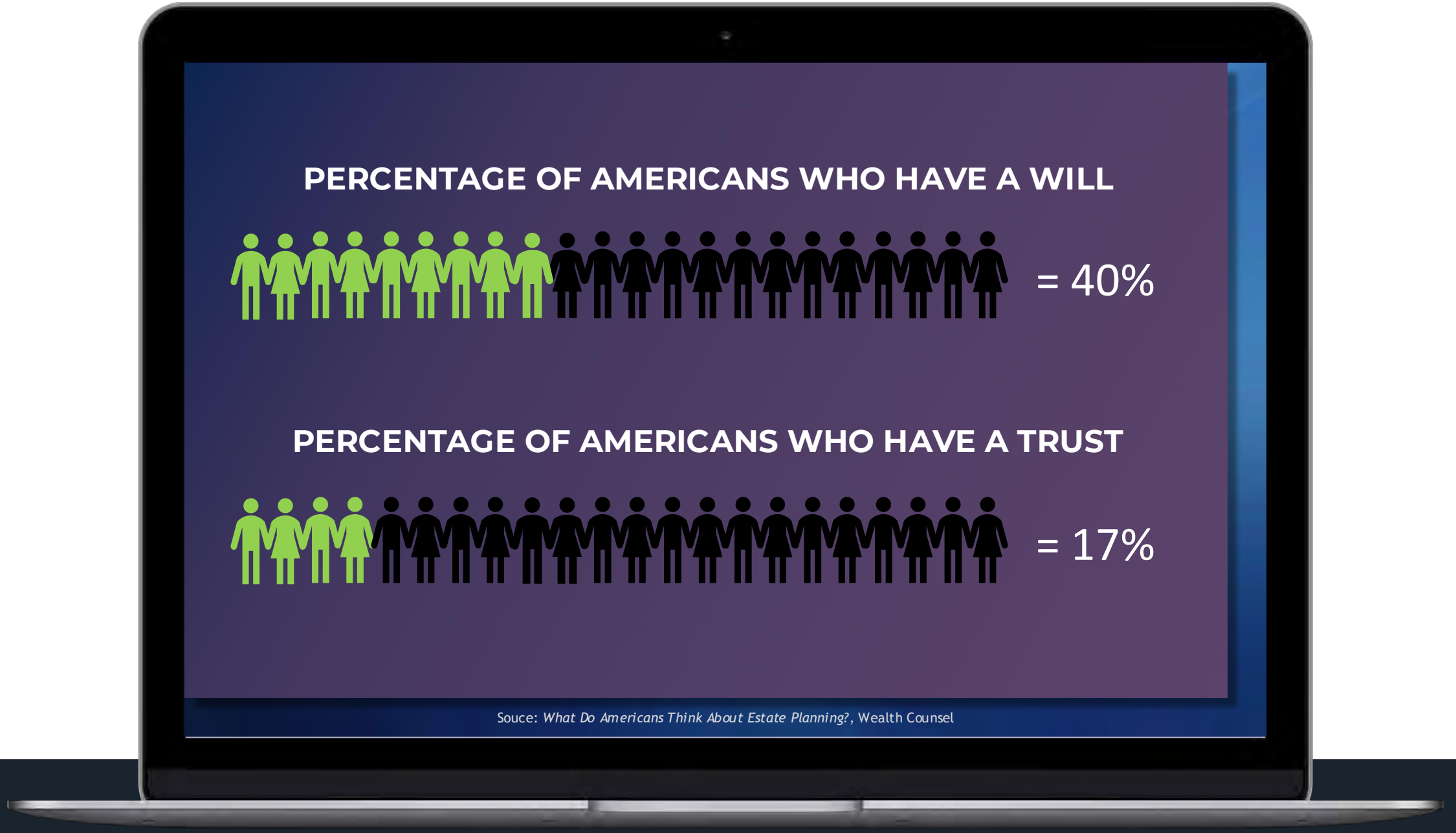
2. FINANCIAL STRATEGIES: GROWTH & PROTECTION

3. TAX PLANNING STRATEGIES:
   - TAX ON SOCIAL SECURITY
   - TOTAL TAX-FREE RETIREMENT INCOME

4. FINANCIAL STRATEGIES: GROWTH & PROTECTION



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FINDINGS

NEARLY HALF
of all respondents believed that estate planning is only for the ultra-rich and most people don't need it

49%
say their assets aren't worth enough to consider an estate plan

35%
have experienced (or know someone who has experienced) family conflict as a result of NOT having an estate plan or comprehensive will

25%
haven't spoken about it with their families because they don't like to think about their own death

61%
say a will is enough to meet their estate-related needs

46%
of Americans say they are interested in learning more about estate planning

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Source: *What Do Americans Think About Estate Planning?*, Wealth Counsel



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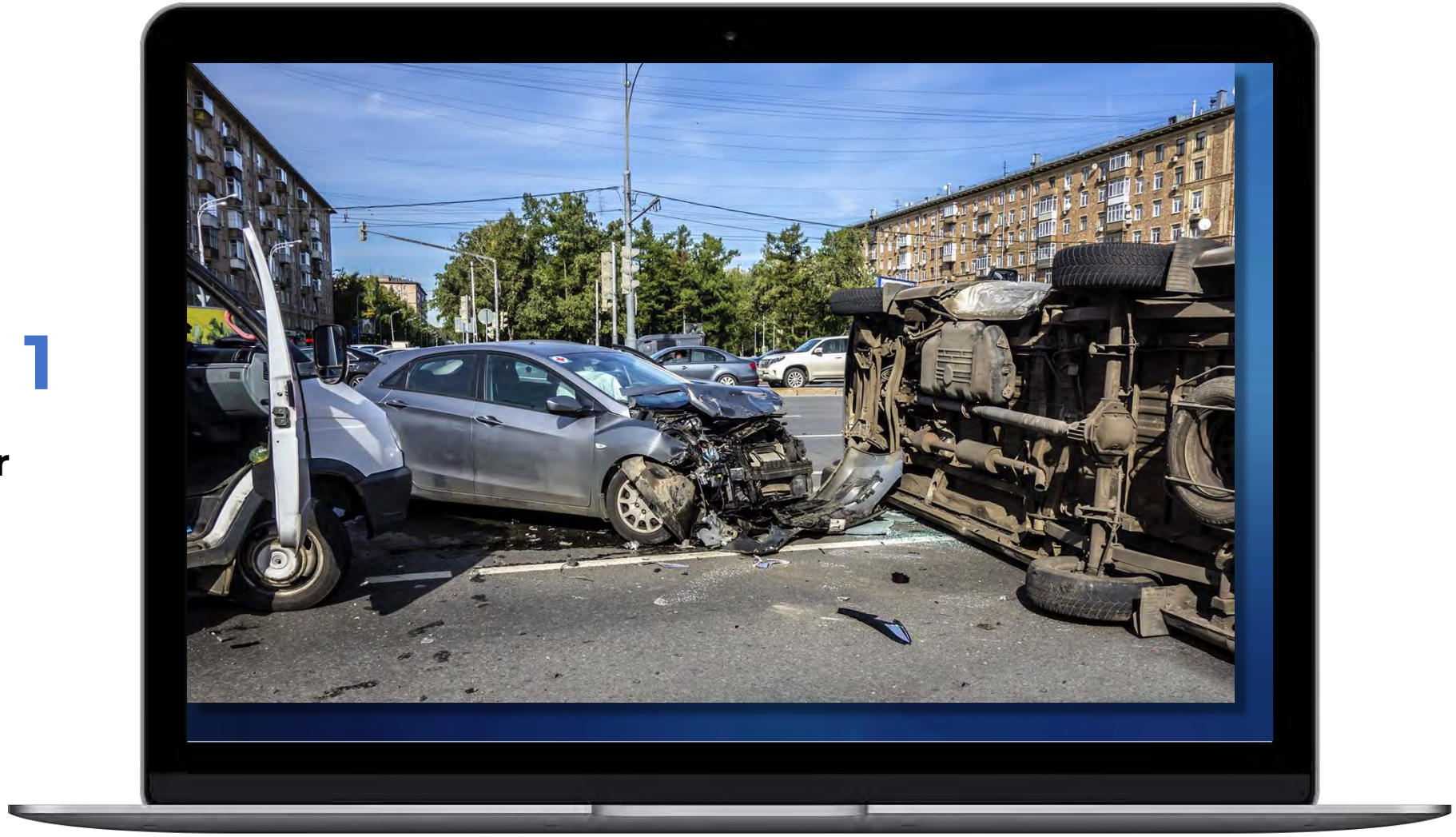
A FEW EVERY DAY SCENARIOS



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SCENARIO 1

A Couple is in a Car Accident



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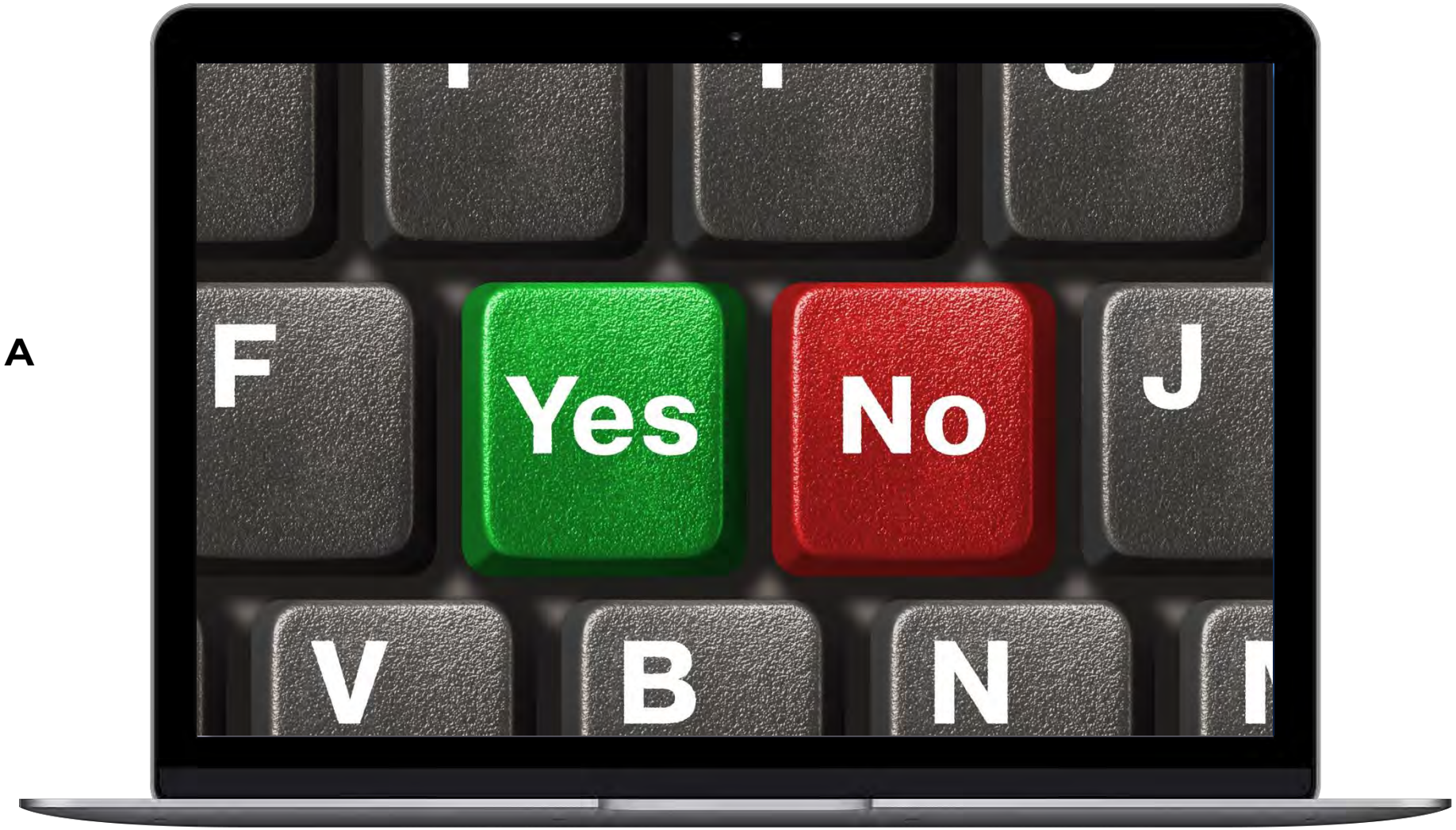
Their adult children come to the hospital but can’t get information.



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WOULD THAT BE A CONCERN?

(1)



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SCENARIO 2

Death of the Parents ...



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SCENARIO 2

Death of the Parents ...



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SCENARIO 2

Death of the Parents ...



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SCENARIO 2

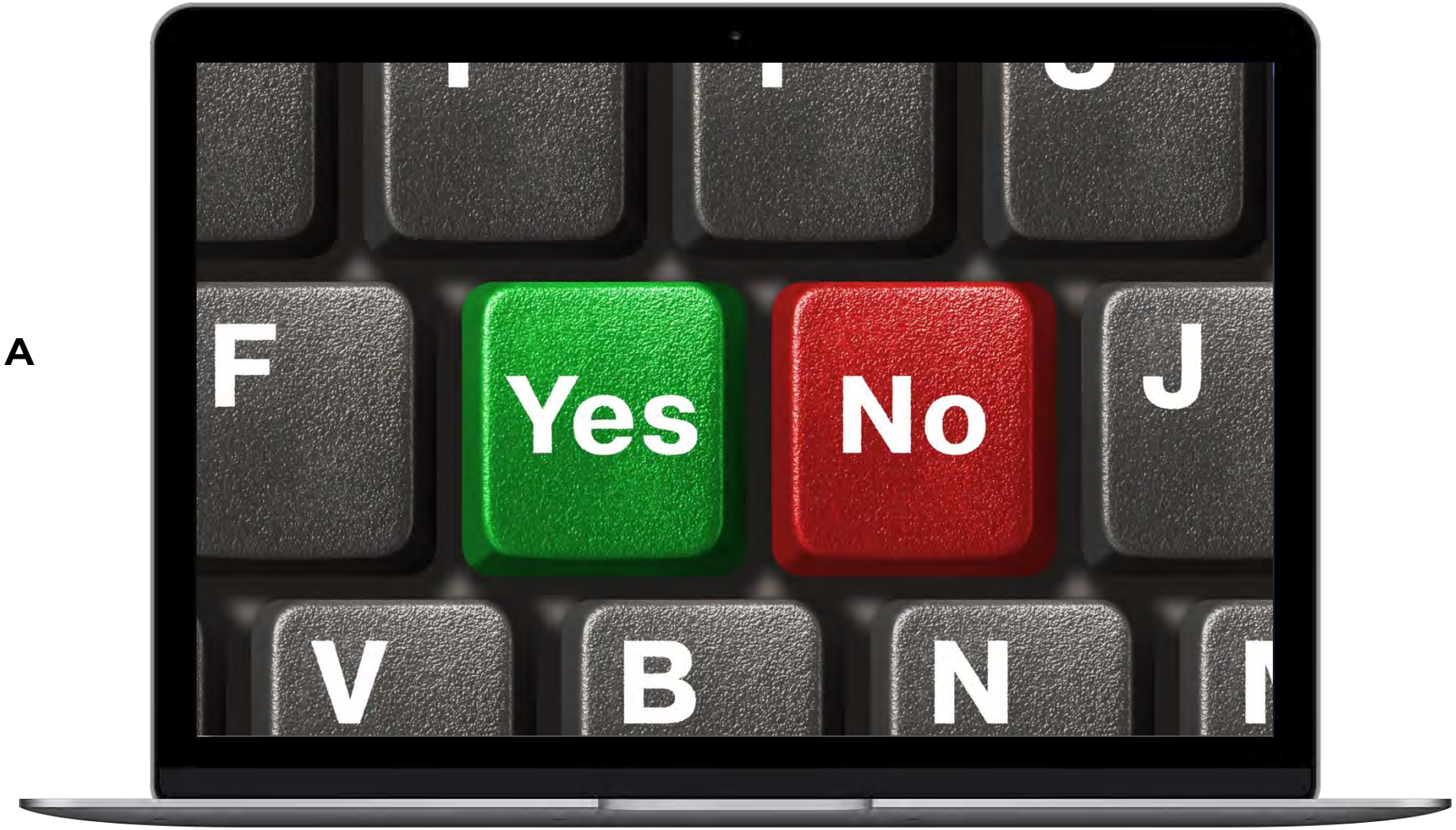
Beneficiary child also passed away



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WOULD THAT BE A CONCERN?

(2)



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SCENARIO 3

Joint Tenancy



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SCENARIO 3

Parent Puts Child on the House & Bank Account



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SCENARIO 3

UNFORSEEN EVENT A:

DIVORCE

Parent(s) Could be Forced to Refinance. Potential Loss of Cash Assets.



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SCENARIO 3

UNFORSEEN EVENT B:

LAWSUIT

Parent(s) Could Lose Entire Home & Cash Assets.



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SCENARIO 3

UNFORSEEN EVENT C:

BANKRUPTCY

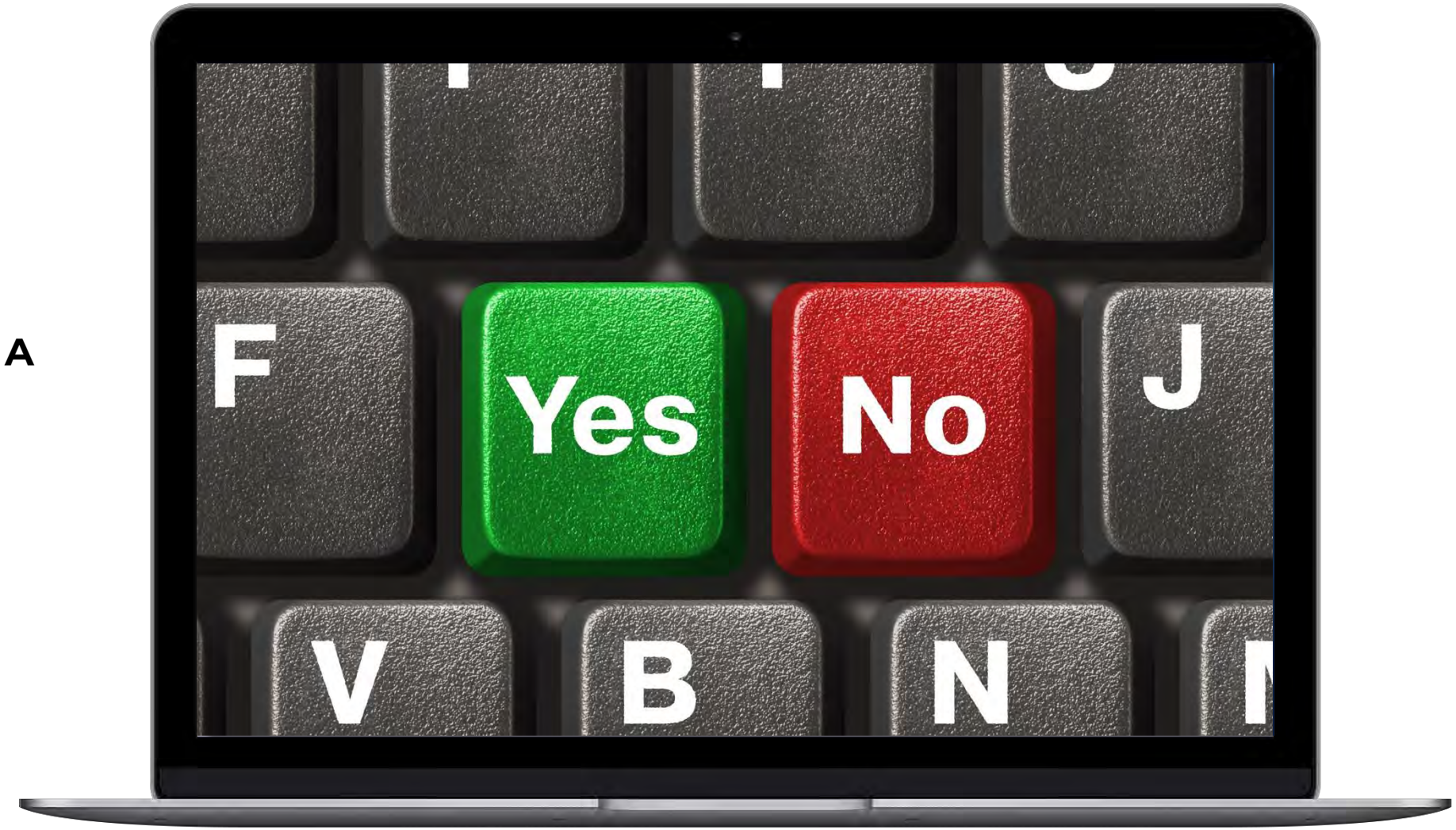
Parents Could Lose Entire Home & Cash Assets.



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WOULD THAT BE A CONCERN?

(3)



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SCENARIO 4

PARENT HAS A LARGE IRA



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SCENARIO 4

PARENT HAS A LARGE IRA AND PASSES AWAY



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SCENARIO 4

Child Receives a Lump Sum:

Lump Sum	$200,000
32% Tax to IRS	$64,000
Remains for Child	$136,000



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SCENARIO 4

If she's single, what if there's a lawsuit or bankruptcy?

$136,000 Could Be Lost



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SCENARIO 4

If married, what if her spouse later files for divorce?



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SCENARIO 4

If married, what if her spouse later files for divorce?

136,000 ÷ 2

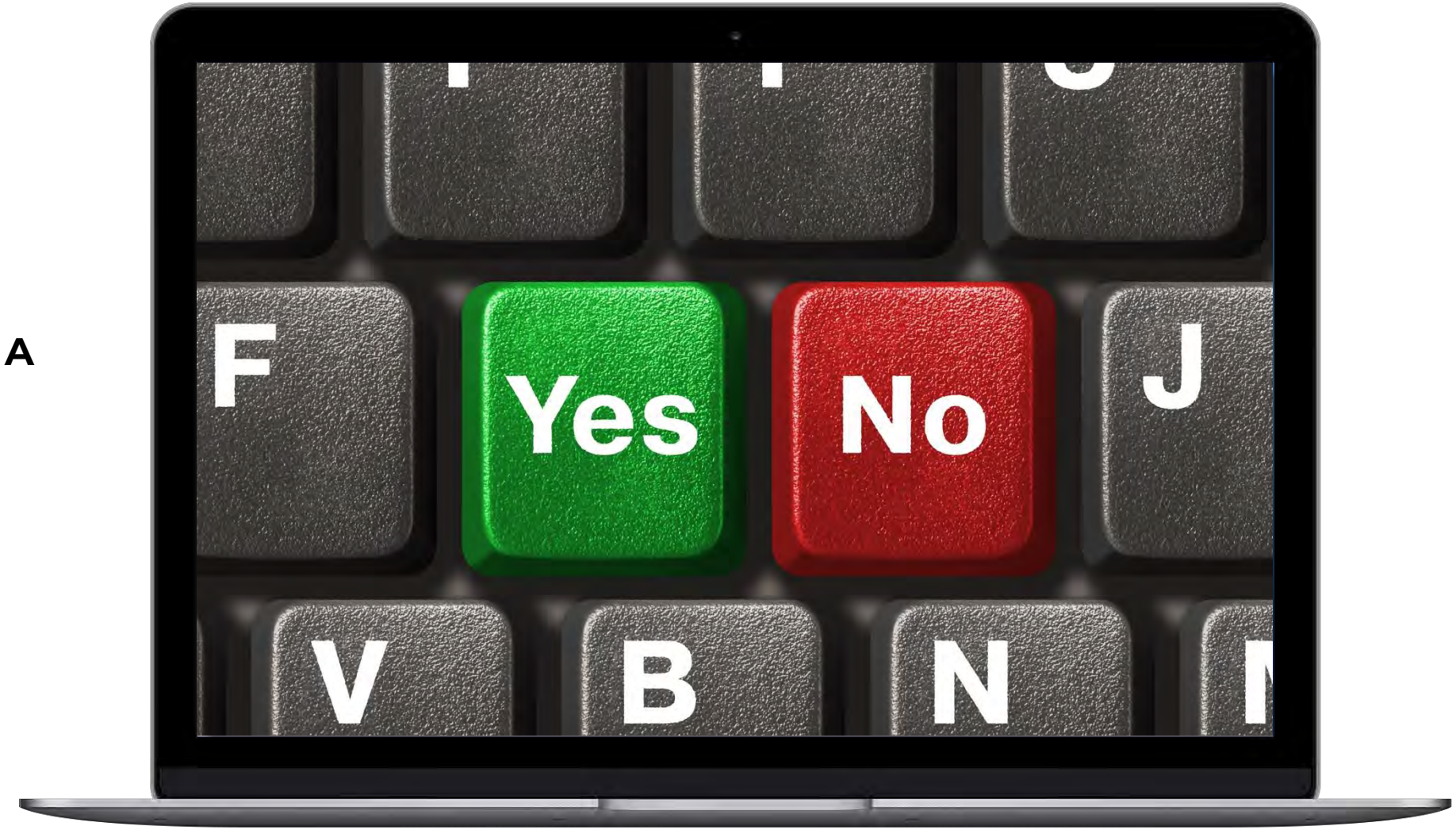
Split two ways = $68,000



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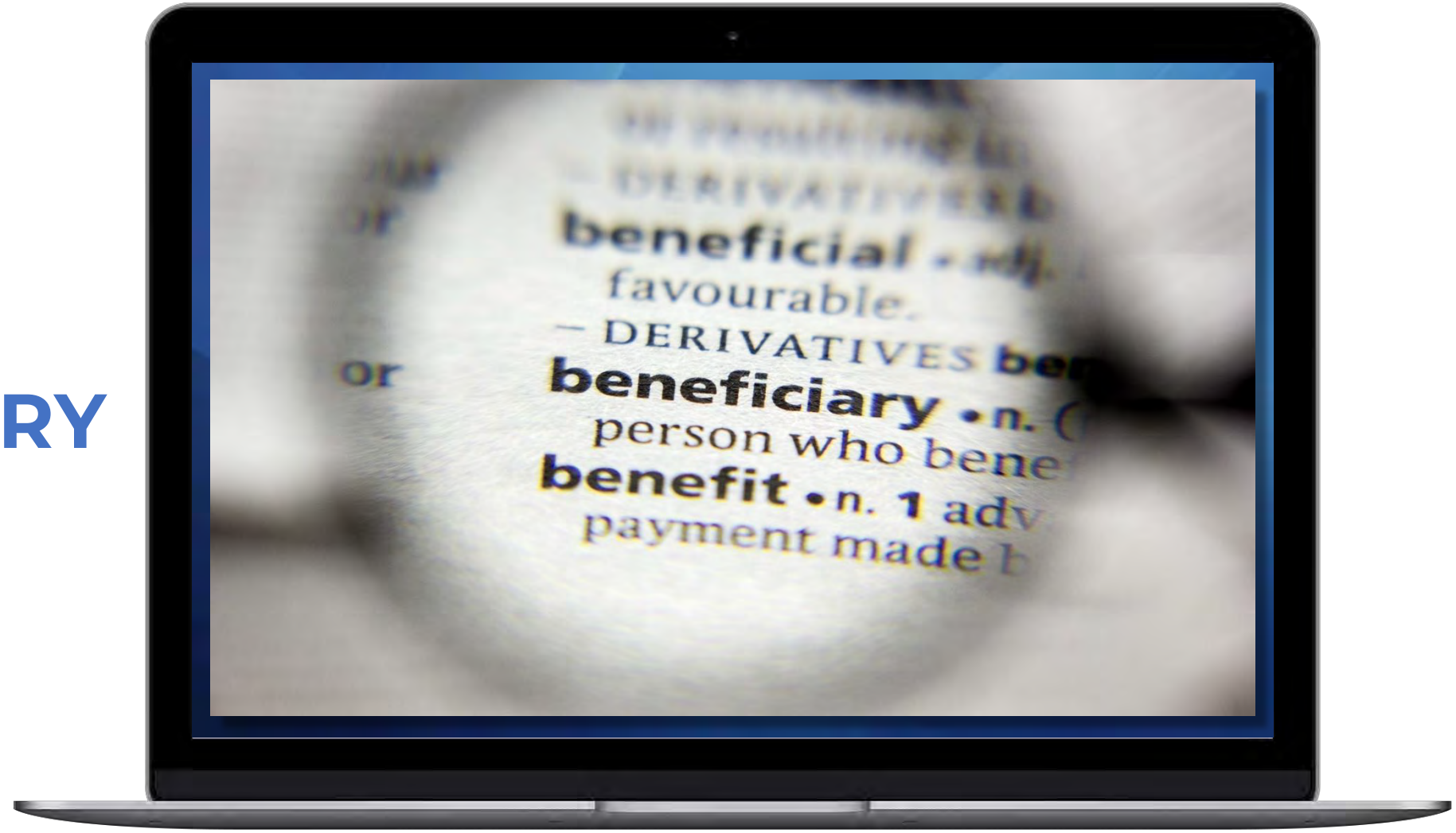
WOULD THAT BE A CONCERN?

(4)



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IRA BENEFICIARY TRUSTS



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IRA BENEFICIARY TRUSTS

ENABLES YOU TO DO THREE THINGS:

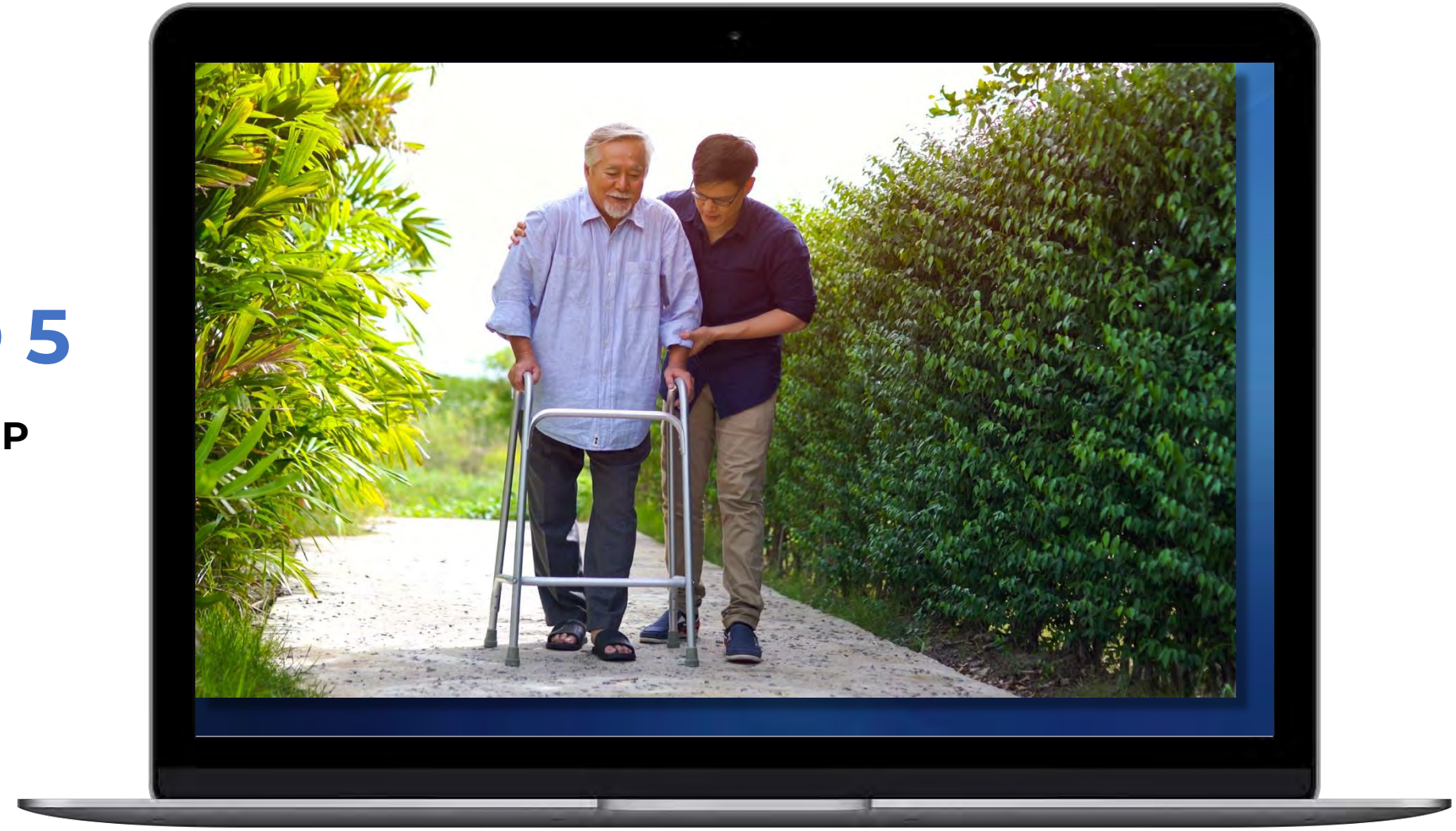
1. **Manage the distribution after you're gone**
2. **Protect your children against a lawsuit**
3. **Protect your children against divorce**



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SCENARIO 5

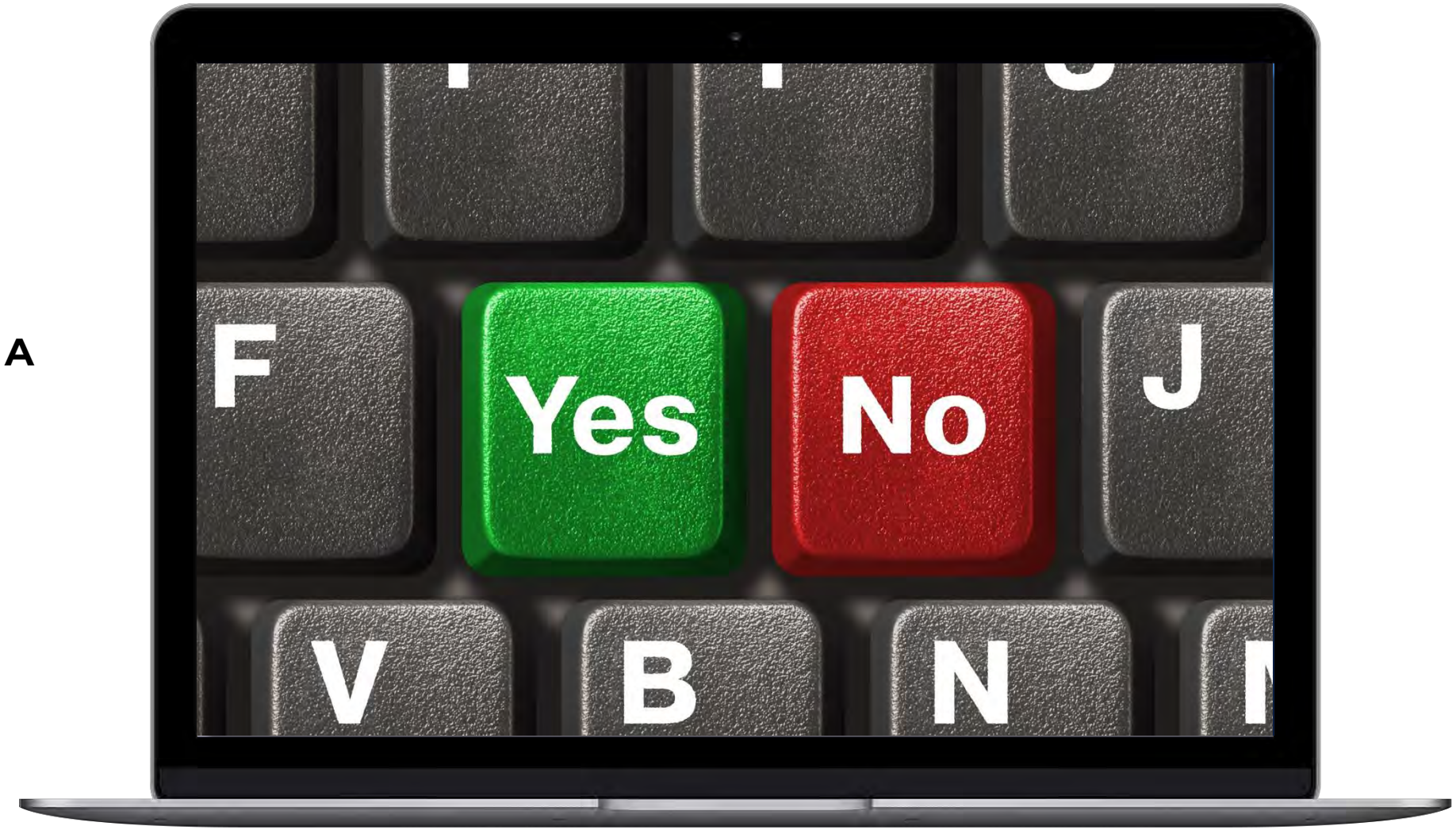
CONSERVATORSHIP



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WOULD THAT BE A CONCERN?

(5)



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YOUR PRESENTER

STACY PEARSON

UNIVERSAL GUARDIAN TRUST

Years as a Legislative Assistant & Advocate

Lobbying at every level of Government for those who can't speak for themselves, including:

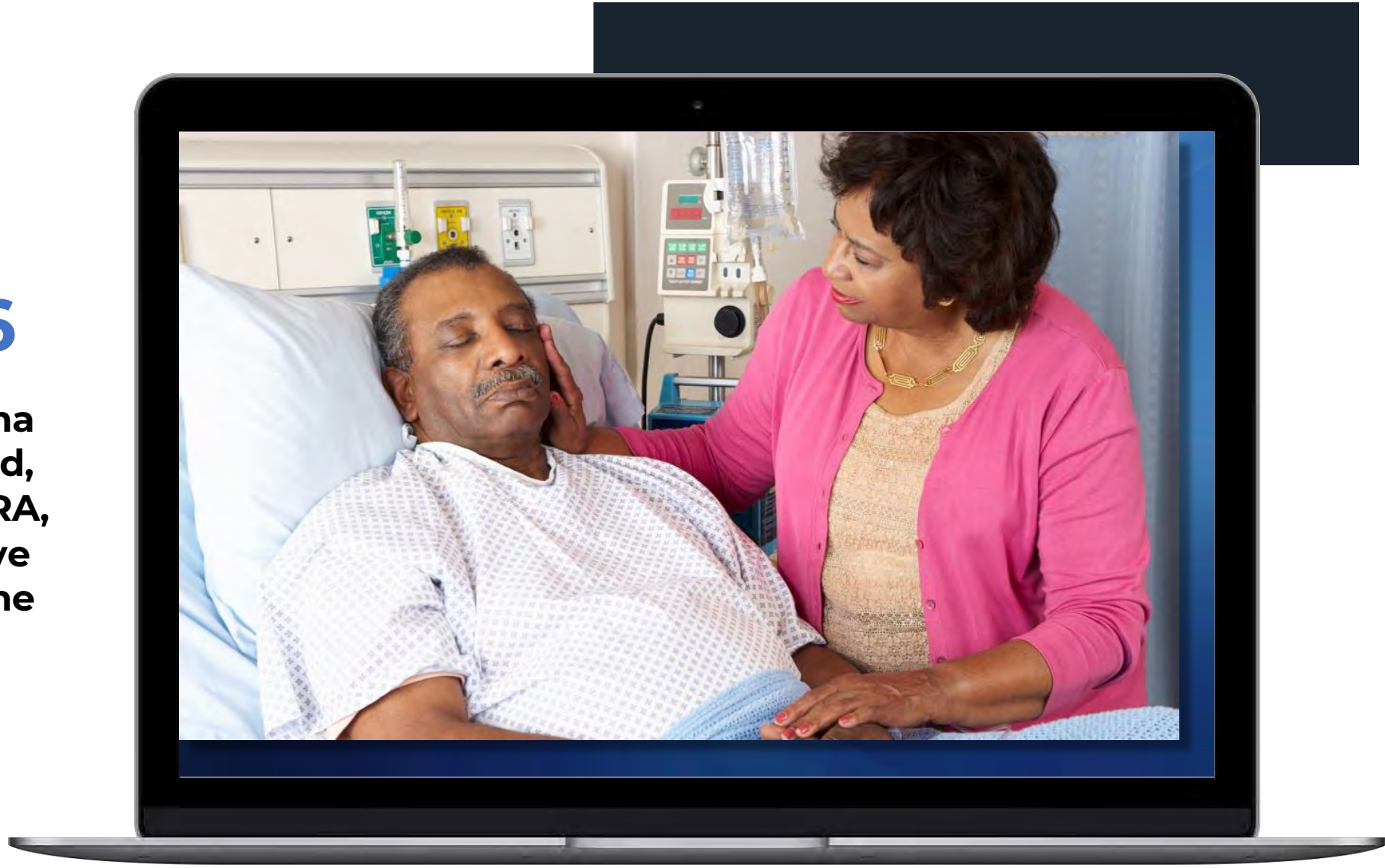
- Speaking at the United Nations
- Discovered Families Falling Through the Cracks
- Created the product that covers all dependents



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SCENARIO 6

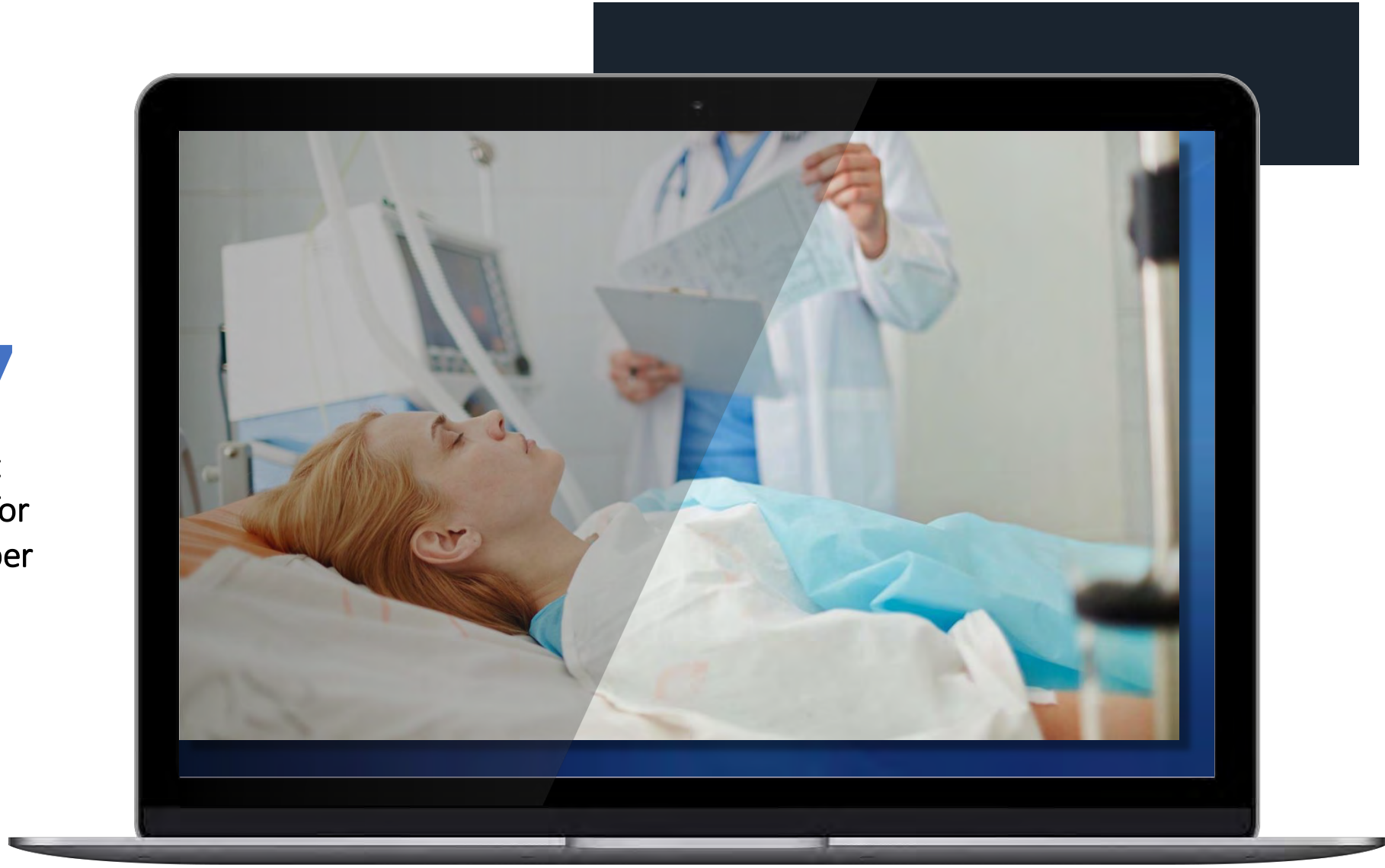
If your spouse is in a coma or becomes incapacitated, and your spouse has an IRA, what access will you have to that money without the proper documents?



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SCENARIO 7

What rights do you have to get information or make a decision for your adult child without the proper documents?



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PROPER ESTATE PLANNING CAN ADDRESS ALL OF THESE SCENARIOS

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MOST COMMON QUESTIONS

- WHAT'S BETTER … A WILL OR A TRUST?
- Probate Court: What Is It?

  - How Does It Work?

  - Can It Be Avoided?



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WHAT IS PROBATE COURT?

Granting of probate is the first step in the legal process of administering a deceased person's estate. It resolves all claims while distributing all the deceased person's property under a will.



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WHY DOES PROBATE COURT EXIST?

EXAMPLE: LANDSCAPER'S INVOICE



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PROBLEMS WITH PROBATE

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#1. FEES

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PROBATE FEES IN FLORIDA



Probate Threshold
$75,000

PROBATE FEES

ATTORNEY AND PERSONAL REPRESENTATIVE FEES

ESTATE SIZE	TOTAL FEE
$40,000	$1,500
$70,000	$2,250
$100,000	$3,000
$300,000	$8,500
$500,000	$13,500
$1,000,000	$28,000

**** These are minimums, if there are no disagreements**

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PROBATE FEES

ATTORNEY AND PERSONAL REPRESENTATIVE FEES

- 6 month automatic temporary injunction
- Average Probate is 9 months but could be longer if there are disagreements
- 10 day rule – the individual in possession of the deceased's last Will and Testament must file for Probate within 10 days from the date of death of the deceased in the same county where the deceased died.
    - The size of the Estate to be Probated does not affect these ten days
- Attorney is REQUIRED to have an Estate be Probated

WHERE DO YOU WANT YOUR DOLLARS GO?





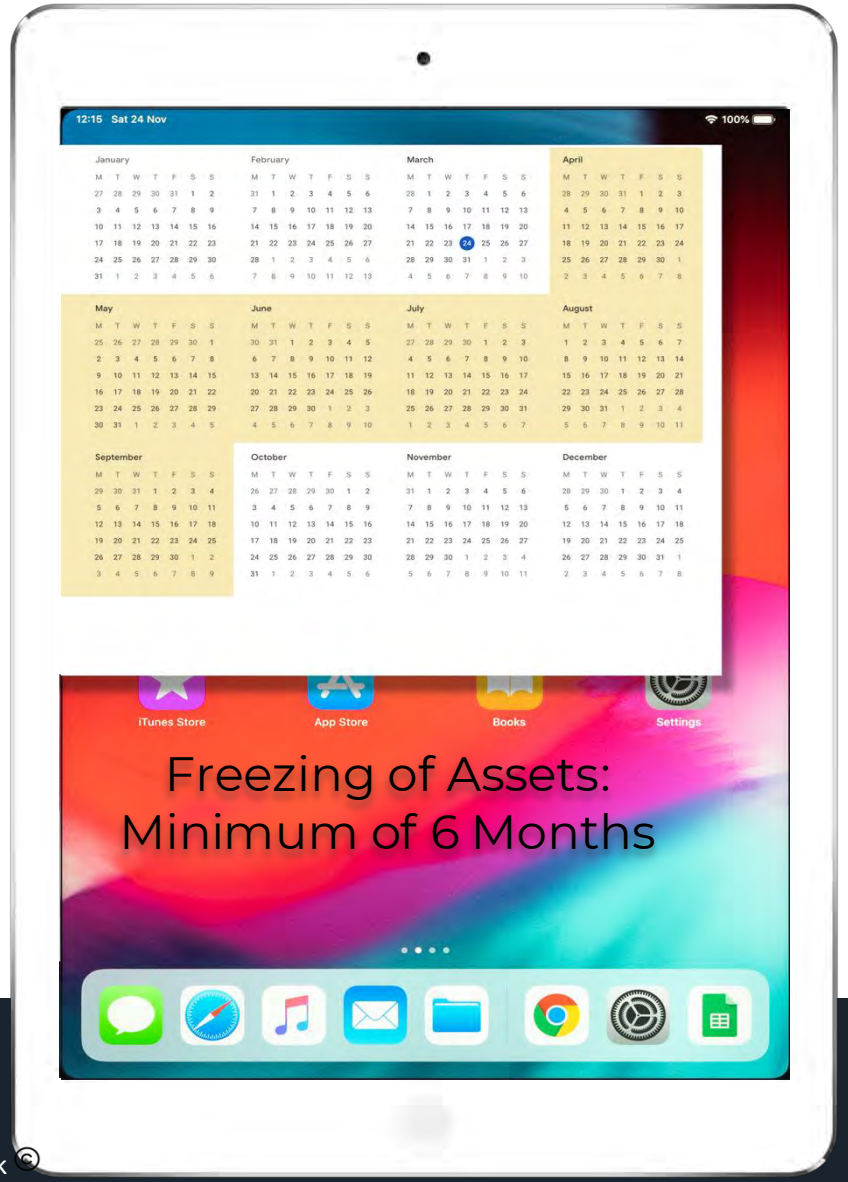
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#2. DELAYS

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IN FLORIDA



WHO WILL PAY...



#3. Public Record – Your Probate Estate Must be Listed in the Newspaper 3 Times.

#4. Contestability – Exposing Your Probate Estate to the Public Can Lead to This.

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WILL =

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WILL = PROBATE

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WILL = PROBATE



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WILL = PROBATE



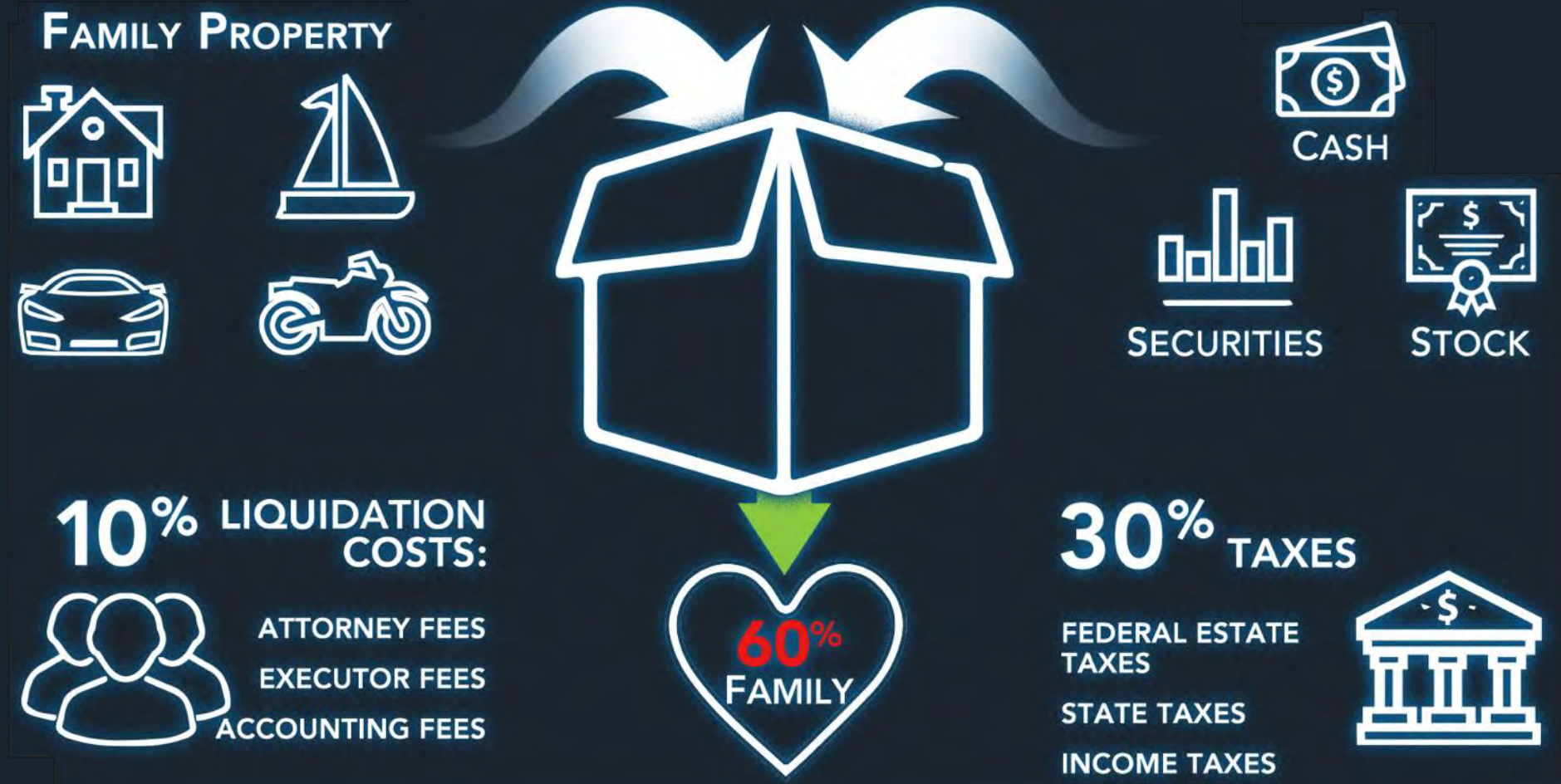
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WILL = PROBATE



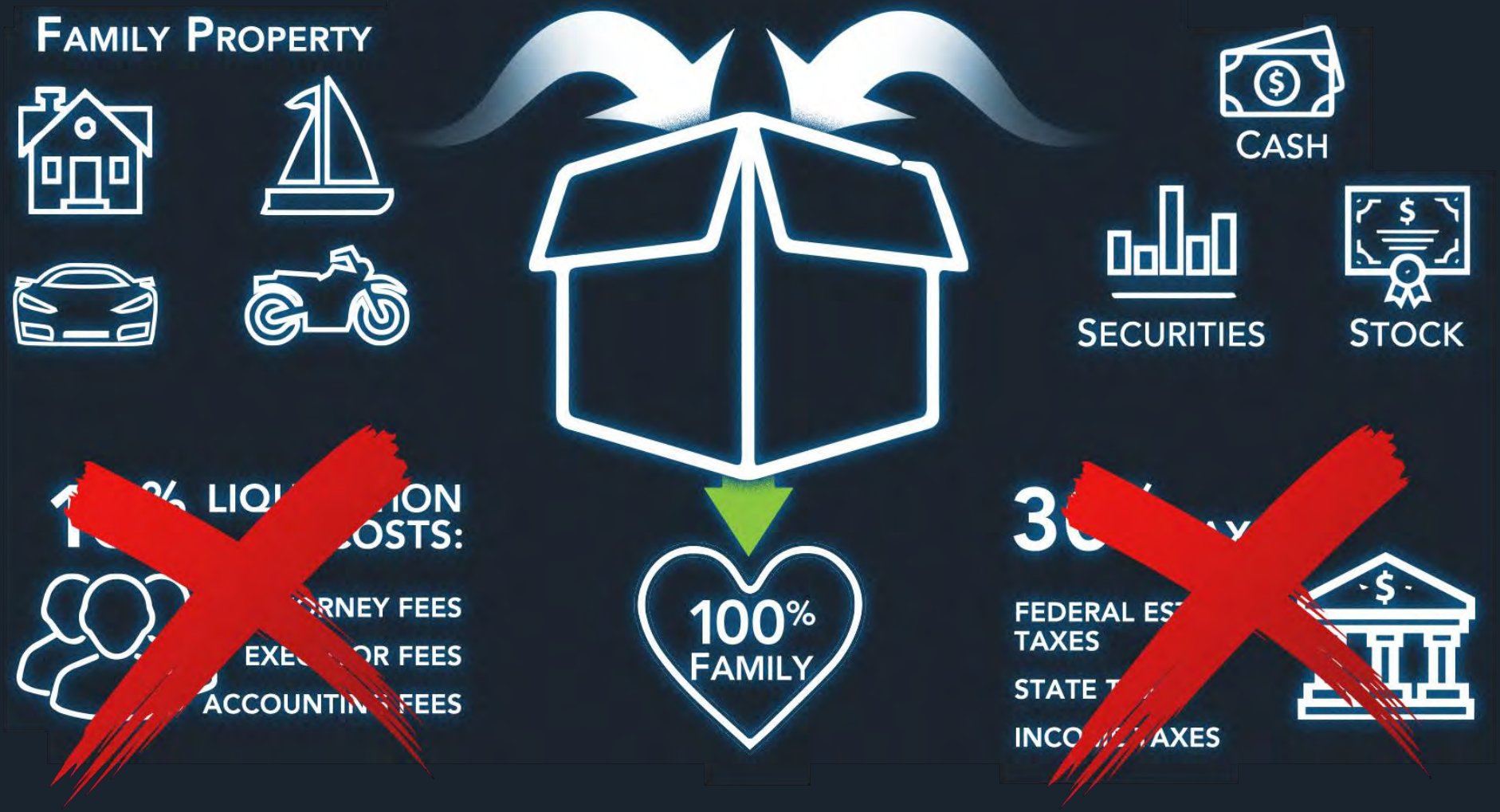
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WILL = PROBATE



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REVOCABLE LIVING TRUST



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ESTATE PLAN...NON-PLANNERS



HOWARD HUGHES



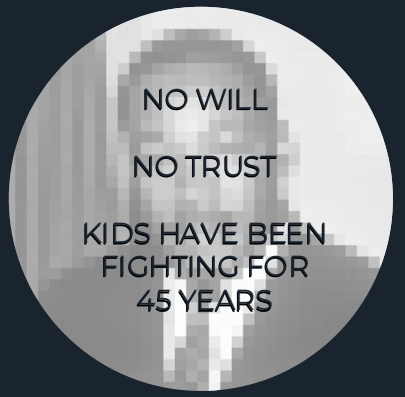
ABRAHAM LINCOLN



ELVIS PRESLY



MICHAEL JACKSON



DR. MARTIN LUTHER KING JR.

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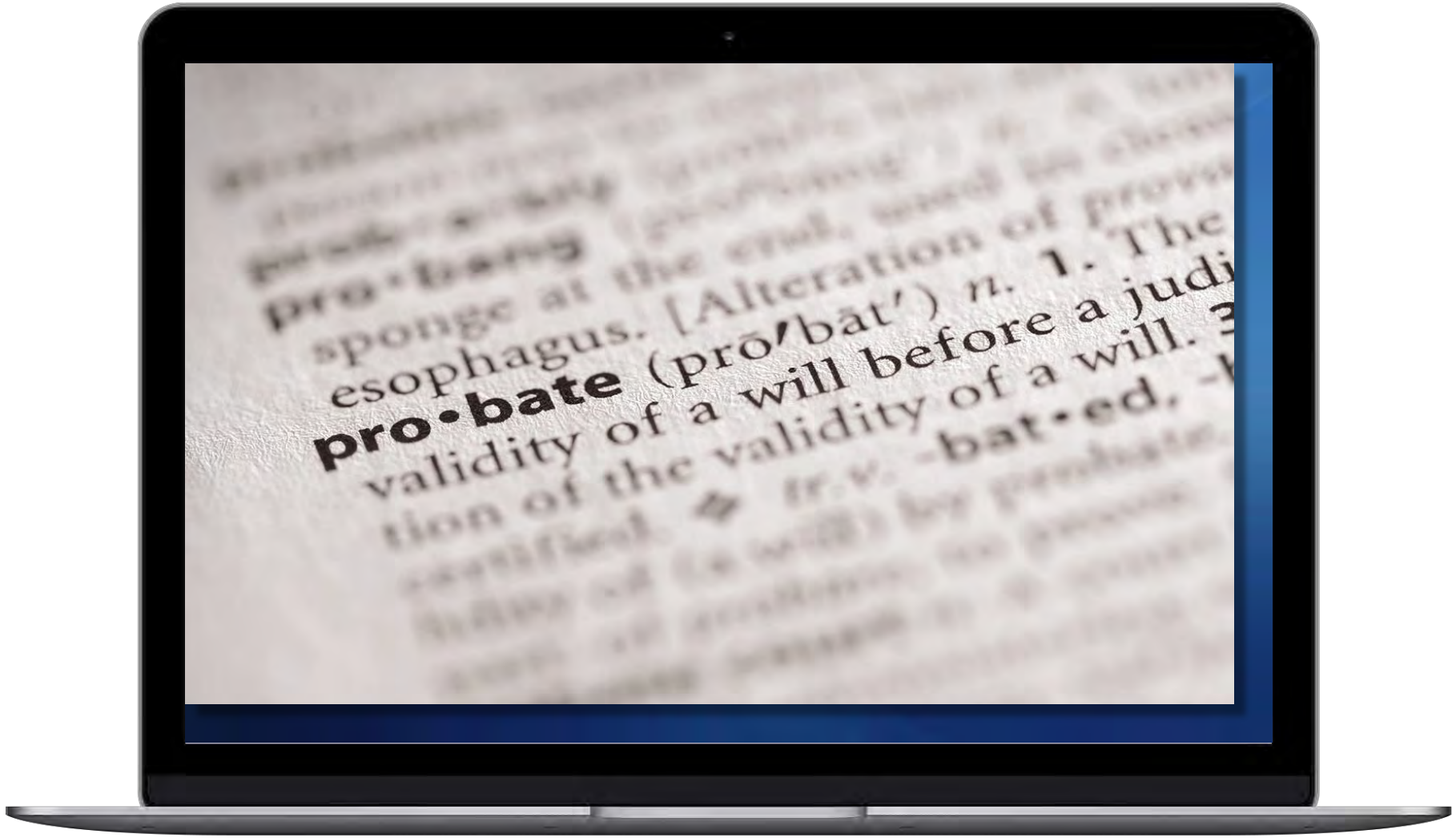
GEORGE LOPEZ ‘ASSISTED’ PRINCE’S FAMILY WITH $20K GIFT AFTER SINGERS DEATH



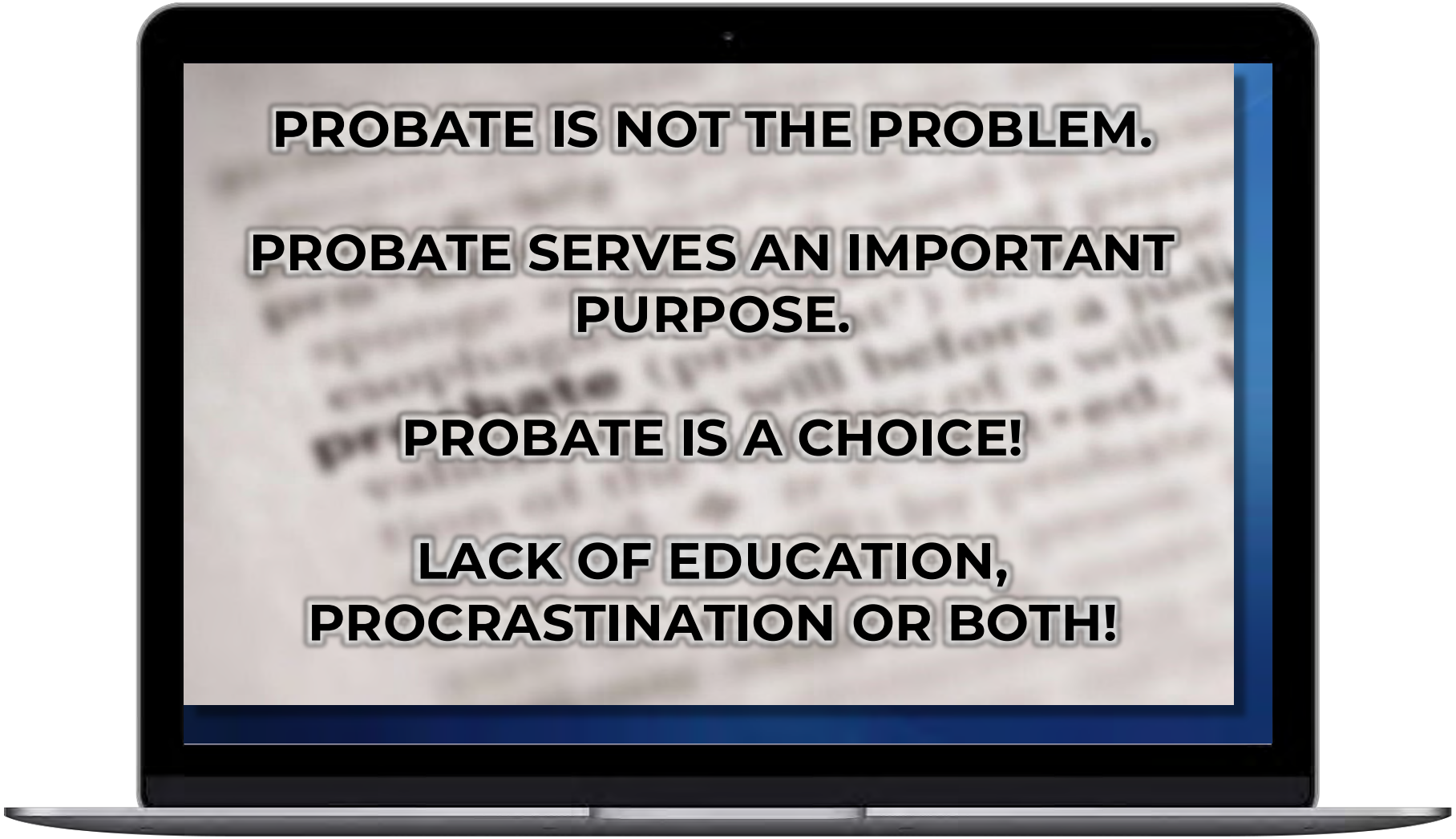
This happens every day in America. Prince’s situation was publicized because he was a celebrity. However, most families find themselves in the same situation questioning “WHERE is the money going to come from?” With our estate liquidity plan we can give the heirs access to funds in 24-48 hours when they need it most.



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Question: Do you want to avoid probate?

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Parties Involved in a Trust



Grantor/Settlor
You/You & Your Spouse

Assets






Trust



Assets








Beneficiaries

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IF YOU ALREADY HAVE A TRUST

01

Are you 100% sure your Trust is properly and fully funded? (Most are not)

02

Is your healthcare Power of Attorney HIPAA Compliant? (Are your medical records accessible by your Power of Attorney)

03

Does your current Trust have an IRA Beneficiary Trust? (Control Distribution, protects against Lawsuit and Divorce)

04

Are you sure who are your: Successor Trustees, Successor Executors, Health Care and Financial Powers of Attorney?

05

Do you have a Pour Over Will?

06

Have you had any Major Family Changes: Divorce, Marriage, Births, Disability of Family member, Inheritance, Major Purchase of Property or other Asset?

07

Had you made any arrangements as to how you would like to be treated - or not treated - if you were incapacitated?

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THANK YOU FOR JOINING US!



&



SETUP YOUR FREE ONE-ON-ONE CONSULTATION

Come to see us within 6 days and we will take 30% off our Traditional Trust Plan fees.

GET YOUR QUESTIONS & CONCERNS ANSWERED

To schedule your appointment please go to:
Enter your calendar link here

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