

# Trusts Are For Everyone

Protect your loved ones from the hidden headaches, heartaches, and costs of using a will.

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HOW? Set up a revocable living trust in 3 simple steps.

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# A WILL IS NOT THE WAY TO PROTECT YOUR LOVED ONES

Most people who leave a will to protect their legacy do so because they've been told "leaving a will" is just what you do.

Here are the two most common myths we see about wills, trusts, and effective planning:



## **Wills are good planning tools.**

**FACT:** Unfortunately, **wills guarantee your heirs the very headaches, heartaches, & costs** you are trying to avoid by having a will. More on that in a moment.

Living Trusts offer more ironclad protection for beneficiaries, more control, more flexibility, and faster inheritance than wills.



## **Trusts are complex, expensive and only for the wealthy.**

**FACT:** Trust-based plans can be easy to set up and cost far less than wills ever could.

**Revocable living trusts are for almost all of us.** If you have a spouse, a family, a business, or property then you can benefit from a trust.

If you don't plan the right way, did you know...

**Your family is not protected.**

**You guarantee the awful process of probate.**

**You will cost them tens of thousands.**

**Your heirs will be penalized.**

**Your wishes can be easily contested, by anyone.**

**Anyone can make a claim to your assets.**

*"No one ever told me this. I thought I did the right thing for my family by getting a will. This should have been taught in school. At least I know how to take care of an egg like it's a baby."*

Carl P

# WHAT NO ONE EVER TOLD YOU ABOUT WILLS

Sure, wills are "cheap" but the problem with a will is that it guarantees probate.

Do you want what's "cheap" or do you want what's right?

**PROBATE** is the legal process of transferring a title from one person to another and most people want to avoid it because...

- It can take a long time.
- Your assets are frozen, so your family must pay out of their pockets for your legal fees.
- This is when families start to fight.
- Everything becomes public knowledge.
- The fee will be a percentage of the total value of all you own.

If you're like most people, these do not sound like something you want happening to your family.

You may be thinking...

***"IT WON'T HAPPEN TO ME."***

Lots of people felt the same way until it did happen to them.

**Families that have always gotten along begin to fight and don't speak to each other for 20 years.**

**It should be easy but someone unexpected contests the will causing delays and more expenses.**

**A will gets lost, and a family has no idea how things are supposed to be divided so the court gets to decide who gets what.**

This list can go on and on but how does a revocable living trust compare to a will?

Let's see...

## WILLS

## AVOIDS EVIL PROBATE

## TRUSTS

**NOPE**

A will guarantees probate and all the headaches, heartaches & costs that come with it.



**YEP!**

A trust avoids probate like four-week-old leftovers.

*"It took my dad 3 years to go through probate for my grandmother because of one cousin."*

Ben M

## INHERITANCE SPEED

**SLOW**

as a sleeping sloth. It could take between two months & two years.



**FAST & EFFICIENT**

like a wolverine. This takes two weeks to two months. Much quicker.

*"I don't want anyone knowing what my kids are getting. That's no one's business but mine."*

Ted L

## PRIVACY

**NONE**

Your life literally becomes public record. It's like you're flashing everyone.



**EXTREMELY PRIVATE**

Think of a treasure chest, inside a safe, in a vault, buried underground.

*"My sister tried to say my dad was not of sound mind so she could get more. She got shut down quick."*

Penny H

## AVOIDS CONTESTABILITY

**NOPE**

Anyone for any reason can contest your will costing your heirs time and money.



**OH YEAH!**

You can even set rules that if someone tries to contest, they get nothing.

*"We didn't want a will because we have a son that's not good with money. We didn't want him getting it all at once."*

Cam & Claire

## PROTECTS BENEFICIARIES

**IT DOESN'T**

Everything you leave behind could be taken away due a divorce or lawsuit.



**CAN'T TOUCH THIS!**

Trusts are like leaving your heirs their own SEAL Team Six for protection.

We combine the **knowledge, experience & advice** of a **trusted attorney** with the **ease, flexibility & convenience of online access**.

Our Digital Trust Platform has transformed the way people plan...



### 100% ONLINE

This isn't your grandpa's trust. Everything is online allowing you to set up your trust quickly and make updates in real-time.



### QUICK

With just a few calls/Zooms your trust can be completed. You can expect 90% of your planning to be complete in 90 minutes.



### EASY UPDATES

Update your trust in seconds at no cost. With 24/7 access you can manage your trust when it's convenient for you.



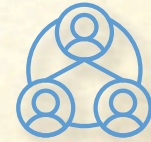
### QUICK ACCESS

Where's your trust? Check your phone in your pocket. It's on your computer. It's on your tablet. It's wherever you need it to be.



### COMPLETE CONTROL

It's your trust and you can control it from anywhere in the world and share it with anyone to have complete transparency.



### TRUST TEAM

Whenever you have questions, our team of advisors and attorneys will help you get the right answers you need.



We know how  
**frustrating & confusing**  
this process can be when  
all you want to do is the  
right thing.

# What Our Clients Like About Us



*"I had been putting this off for years. I thought it was going to be too complicated & boring. I was shocked when I saw how easy it was to set up. For me, this was fun."*

Bill P

*"This was so simple. I finished my trust & I didn't even realize it."*

Suzanne S



*"I had done a trust with a local attorney, but it was such a pain. I found this and scrapped the other trust. The complete control & easy updates are what made me go this route."*

James E

# SETUP YOUR TRUST IN 3 EASY STEPS

1

## DISCOVERY CALL

Find out if a trust is right for you.

2

## INTAKE CALL

Create your online trust & schedule your next call.

3

## TRUST SETUP

Orientation & funding, specific wishes & attorney validation.

# WHO NEEDS A TRUST?

If you have a significant other or a family then a trust will give you the control, protection & flexibility you need while keeping you out of probate court.

Who else may benefit from a trust...

## BLENDED FAMILIES



You have your stuff. They have their stuff. Together, you create more stuff. What

happens to the stuff in each of these categories when one of you passes? Who gets it? When? This could get messy.

## HAVE MINOR CHILDREN

Who will take care of your amazing little crumb-crunchers if something happens to you?



Who will care for your special needs child? Who will handle their money and when will they get it? A trust handles all this.

## UNMARRIED COUPLES

Have a long-term boo but never tied the knot? Do you want to make sure your partner is protected and has the same legal rights as a married couple?

## PROTECTION REQUIRED



Do you have children or beneficiaries that aren't good with money? Do your heirs struggle with addictions/habits that would be worsened by receiving lots of money at once? Do you have a child married to someone you don't trust? You can protect them.

## ASSISTANCE REQUIRED

Do you have a family member who is unable to care for themselves? Will they need assistance when you're gone? Do you have a beneficiary who depends on Medicaid and other needs-based government assistance?

## COMPLETE CONTROL



This isn't being a control freak but there are some circumstances that require you to be able to control things from beyond the grave.





## PROPERTIES IN MULTIPLE STATES

Do you own more than one property that is in more than one state? Things like rentals, vacation homes, or commercial real estate?

This gets messy without a trust.

Without a trust you are looking at going to probate court in each state you have property in.

If your beneficiaries are good people they won't hate you for this, but they will use words we don't feel comfortable typing during the process.



## BUSINESS OWNERS

Do you own a business? What will happen if you can't run it?

How will your business pass to the person you want it to go to?

Are your personal assets protected from a business law suit?

### TRUE ASSET PROTECTION

begins with a revocable living trust.

People who own a business or own multiple properties would rest better knowing their personal assets and business assets are actually protected.

Very few people are ever told this.

Now you know and can take the right next steps.

# FAQS

## **WHAT IS THE COST?**

\$2,945 one-time trust fee plus a \$95 annual fee for the online portal access.

## **DOES THIS TRUST WORK NATIONWIDE?**

Yes. These trusts are based out of Nevada. Nevada has the most trust-friendly laws and works nationwide.

## **DO I HAVE ACCESS TO ATTORNEYS?**

Yes. You have access to communicate with them through the online portal for any of your needs. Thankfully, 99% of your needs can be handled without an attorney.

## **CAN I SHARE ACCESS WITH ANYONE?**

Yes. You can share access to your trust with anyone you like. This can allow full transparency if you prefer. Anyone you share access with does not have the ability to make any changes.

## **WHY WOULD I DO THIS OVER A LOCAL ATTORNEY?**

The challenge with working with a single, local attorney is that they are not always the easiest to work with. They retire, slow down, or stop practicing and then you need to find someone to service your trust, which you won't be able to do.

## **WHO IS IN CHARGE OF THE TRUST?**

You are. You are called the grantor and trustee. If something happens to you there is a secondary trustee that will step in when needed.

## **WHAT HAPPENS WHEN I PASS AWAY?**

When the creator of the trust passes away the trust becomes etched in stone, and nothing can be changed. The secondary trustee must adhere to the grantor's wishes as stipulated.

## **HOW OFTEN DO WE REVIEW THE TRUST?**

We do this annually to make sure everything is up-to-date and then make any changes needed.

## **HOW LONG DOES IT TAKE FOR A CHANGE TO BE UPDATED?**

It's instant. As soon as you make the change or request a change be made, it's done.

At Both Hands Financial Group, we know you want to be a person that takes care of what's most important.

In order to do that, you need to **feel good about your decision.**

**The problem is what you've been told your entire adult life about planning creates more problems than it solves which makes you feel frustrated and overwhelmed.**

We believe planning ought not be so difficult & time consuming and that your heirs should not be penalized for receiving what they will be left anyways.

We understand what it feels like to want to make the right decisions for your family and their future which is why we've helped people across the country just like you find a simple and effective solution for their family.

Here's how we do it...

- 1. Schedule a discovery call to see if a trust is right for you.**
- 2. Complete the short intake call to set up your trust.**
- 3. Work with the trust team to complete and customize your trust.**

Schedule your discovery call **NOW** so you can stop putting this off and leaving your family at risk and instead walk with your head held high because you know you've done the right thing.

# About BOTH HANDS FINANCIAL GROUP

CONTACT YOUR BOTH HANDS FG  
ADVISOR TO GET STARTED NOW!

or

[CLICK HERE](#) or scan the **QR Code**

to schedule a call with our  
Trust Director.



Both Hands Financial Group provides solutions to some of life's biggest concerns.

*"Our job is to plan for the things you don't see coming."*

**Cory Carlton**  
CEO & Trust Director

Both Hands FG serves over 10,000 clients across the country when it comes to...

- Trust & Estate Planning
- Strategic Income Planning
- Medicare
- Extended Healthcare
- Life Insurance
- Secure Guaranteed Retirement Accounts
- Tax-Free Retirement Accounts
- Investments
- And much more...

**BothHandsFG.com**

DISCLAIMER: This document is not providing any legal council. It is intended to provide information on the differences between wills and trusts and how trusts may be a beneficial planning tool.