



*This is only an sample agenda  
and is subject to change*

# 3-DAY ASSET PROTECTION AND WEALTH CREATION SUMMIT

## DAY 1

*Check-in Begins at 8:00 am, Doors Open at 8:15 am - Classroom Hours: 9:00 am – 6:00 pm*

### INTRODUCTION TO THE SUMMIT

*Don Pendleton - Host & Emcee*

- A. How to Get Most Out of the Summit**
- B. The Pillars of Financial Freedom**
- C. Introduction of Presenters**
- D. Instructions for Personal Strategy Sessions**

### HOW STRONG IS YOUR ASSET PROTECTION?

*Clint Coons, Esq.*

- A. Understanding Asset Protection**
  - 1. Structuring for different asset classes
  - 2. Recognizing activities that create liability
  - 3. Insurance protection myths
  - 4. Various legal threats faced by everyone
- B. Asset Protection Solutions**
  - 1. Keeping real estate ownership private
  - 2. Transfer real estate without a paper trail
  - 3. Structuring solutions for control & privacy
  - 4. Legal strategies for different investments
  - 5. Customized LLC operating agreements
  - 6. States with the best charging order protection
  - 7. Effective use of Series LLCs
  - 8. Benefits of Wyoming Statutory Trusts
- C. Latest Trends & Threats Facing Investors**
  - 1. Recent IRS probes and targets
  - 2. Current lawsuit threats to business owners
  - 3. What to learn from recent landlord lawsuits
  - 4. How to minimize the target on your back
- D. Overview — Putting it all Together**
  - 1. Blue, red, and purple boxes
  - 2. Keeping it all straight and understandable

**LUNCH BREAK AT 12:15 – 1:30 pm**

### ESTATE PLANNING TO CREATE A LEGACY

*Clint Coons, Esq.*

- A. Probate and Best Ways to Avoid it**
- B. The Living Trust Solution**
- C. Crucial Ancillary Documents to the Trust**
- D. Federal & State Estate Taxes**
- E. Customizing Your Trust**
- F. When to Not Be Your Own Attorney**

### MAXIMIZING YOUR RETIREMENT FUNDS

*Roberta Hudy*

- A. Why consider a ROTH conversion this year?**
- B. Proposed Capital Gains Tax Increases**
- C. Types of Retirement Plans Available**
- D. Avoiding Common Self-Dealing Pitfalls**
- E. Using Your Business to Fund Your Retirement**
- F. Using Qualified Funds to Buy Real Estate**
- G. Checkbook Control with *Easy IRA LLC***
- H. Avoid State Filing Fees with Business Trusts**

### INVESTING IN TODAY'S REAL ESTATE MARKET

*Kevin Clayson*

- A. Best Real Estate Markets in the US**
- B. Investing in Multiple Markets Simultaneously**
- C. Evaluating Real Estate Neighborhoods & Markets**
- D. Selecting "Purchase Worth" Properties**
- E. Full Transparency of All Transactions**
- F. Leading Indicators & Timing the Market**
- G. Proven Systems for Success**

**CLASS ENDS AT 6:00 PM**

# DAY 2

*Check-in Begins at 8:00 am, Doors Open at 8:15 am - Classroom Hours: 9:00 am – 6:00 pm*

## ACTIVE INVESTMENT PLANNING

*Clint Coons, Esq.*

- A. Proper Entities for Active Investors
- B. LLCs vs Corporations
- C. RE Professional or Dealer – How to be Both
- D. Flipping, Wholesaling, Wholetailing & Airbnb
- E. Where You Should Create Your Entities?
- F. Tax Reduction Hacks to Save You Thousands
- G. Issues for Stock, Currency & Crypto Investors
- H. Separate Passive/Active Income — Save 15.3%
- I. Protect Your Trading Accounts from Lawsuits

## CREATING MONTHLY INCOME IN ANY MARKET

*Mike Coval & Stacy Acevedo*

- A. Learn Warren Buffett's Favorite Strategy
- B. Eliminate 95% of all Financial Risk
- C. 3 Basic Strategies — All You May Ever Need
- D. Primary Strategies for all Market Exchanges
- E. Bring in a 2nd Income in Under 3 Minutes a Day
- F. Learn How to Force a Brokerage to Loan You Money at 3.5%
- G. Learn the Steps to Protect Every Investment Class

*LUNCH BREAK AT 12:15 – 1:30 pm*

## REDUCING YOUR BUSINESS TAXES IN 2021

*Scott M. Estill, JD*

- A. President Biden's Proposed Tax Changes
- B. Critical Information for Business Owners
- C. Real Estate Tax Planning
- D. Qualified Business Income Tax Planning
- E. New Strategies for Automobile Expenses
- F. Understanding the "Lost Tax Deductions"
- G. Credits & Losses under CARES Act
- H. Payroll Tax Credits for 2021
- I. New Rules for Like-Kind Exchanges & Inherited Assets

## LAWSUIT PROTECTION – WHAT ARE TODAY'S THREATS & SOLUTIONS?

*Don Pendleton*

- A. Sources of Lawsuits – What are Today's Threats?
- B. Limited Liability Instruments to Protect Assets
- C. Basics of LLCs & Limited Partnerships (LPs)
- D. Understanding Charging Order Protection
- E. Inside vs. Outside Liability
- F. Tax Election Possibilities for Your LLC
- G. How Many LLCs Do You Need?
- H. Advantages of Nesting LLCs inside LLCs

## FREE MONEY - GRANTS, LOANS AND SUBSIDIES

*Chris Johnson*

- A. Myths and Realities about Grant Funding
- B. Qualifications for Government Grants
- C. 15 Grants and Subsidies for RE Investors
- D. Don't Pay for College... Go for FREE
- E. Learn how The Government Funding Agencies WANT to Send you the Money...
- F. ONLY 2 things you need to know to get \$\$\$
- G. Grant Funding STIMULATES the Economy — Stimulate YOUR Business!
- H. Grant Funding Case Studies: Real Estate, Small Business & Education

*CLASS ENDS AT 6:00 PM*



# DAY 3

*Check-in Begins at 8:00 am, Doors Open at 8:15 am - Classroom Hours: 9:00 am – 5:00 pm*

---

## REDUCING YOUR PERSONAL TAXES IN 2021

*Scott M. Estill, JD*

- A. What's Included in the December 2020 Stimulus Bill**
- B. Time to Plan for Tax Increases in 2022**
- C. New Rules for Charitable Donations**
- D. New Tax Strategies You Can Implement Immediately**
- E. Retirement Tax Planning under CARES Act**
- F. Qualified Business Income & Your Personal Taxes**
- G. How the Proposed Tax Laws will Affect You**

---

## CREATING MONTHLY INCOME IN ANY MARKET

*Mike Coval & Stacy Acevedo*

- A. What are the Hidden Fees Your Money Manager is Charging?**
- B. An Exclusive Strategy to Consistently Beat the Market**
- C. Simple Stock Market Strategies & Tools Anyone Can Learn**
- D. Save Thousands by Taking Control of Your Own Investing**

---

## INCOME TAX REDUCTION STRATEGIES

*Patrick James*

- A. Slash Your Risk of an IRS Audit**
- B. Receive 1,000s of DOLLARS You May Have Donated to the IRS**
- C. How to Track Your Expenses & Stay Organized**
- D. Your Tax Preparer is Only as Good as the Information You Give Them**
- E. Learn How to Categorize Your Expenses the RIGHT way!**
- F. Pay What you Legally Owe — Not One Penny More!**

---

**LUNCH BREAK AT 12:15 – 1:30 pm**

---

## RICHER THAN A MILLIONAIRE – A Pathway to True Prosperity

*Dr. William D. Danko*

Dr. Danko will discuss his Best-Selling books and the fundamental principles and strategies that lead to true prosperity. Backed by 40 years of academic and consulting research on what it means to be truly rich, he'll share insights and specific details on what it takes to be Wealthy and Happy. He will also share his personal experience of applying the principles and teachings he learned from Protect Wealth Academy.

---

## ESSENTIALS OF ASSET PROTECTION

*Don Pendleton*

### A. Ethical Issues of Asset Protection

1. Is it okay to protect your family's assets?
2. When is asset protection too late?
3. How to avoid fraudulent transfers?

### B. Fundamental Building Blocks of Asset Protection

1. Asset protection for stock market investors
2. Asset protection for small business owners
3. Asset protection for real estate investors

### C. Critical Ties & Relationship Documents Between Entities

1. Equipment & real estate leases
2. Management agreements
3. Intellectual property & leases
4. Royalty agreements
5. Personal loans & promissory notes
6. Funding your business interests into the Trust

---

## SYNERGISTIC PLANNING — COMBINING ASSET, TAX & ESTATE STRATEGIES (2+2+2=99)

*Don Pendleton*

- A. Examples & Case Studies**
- B. Creating & Funding Your Personal Estate Plan**
- C. Asset Protection & Tax Reduction at Every Step**
- D. Eliminate Estate Taxes & Avoid Probate**
- E. Closing Comments & Analysis**

---

**CLASS ENDS AT 5:00 PM**