

# NON-GRANTOR, IRREVOCABLE, DISCRETIONARY, COMPLEX, SPENDTHRIFT TRUST

Contract Law Trust designed specifically for Asset Protection, Estate Benefits, & Tax Reduction

**"The Secret to Success is to Own Nothing,  
but Control Everything!"**  
Nelson Rockefeller



## The Ultimate In Asset Protection:

- 1 Protection from Lawsuits
- 2 NOT Subject to tax liens and levies issued against beneficiaries or trustees, divorce and alimony, creditors, governmental agencies, or third-party claims
- 3 NOT Subject to eminent domain (Gov. forced Real Estate sale)
- 4 NOT Subject to court's jurisdiction (Turn Over Orders) except for fraudulent conveyance

## We utilize a one of a kind registered copyrighted Spendthrift Trust

- ✓ The Copyrighted Trusts were written for the primary purpose of ASSET PROTECTION AND TAX REDUCTION with significant benefits of Wealth Transfer & Estate Planning.
- ✓ Taxes Deferred LEGALLY per the Internal Revenue Code (IRC) until future distributions
- ✓ Simplified accounting process – CPA with 3 decades of experience

## Compliance

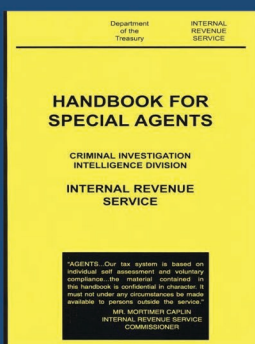
It complies with:

- ✓ US Constitution Article 1 Section 10
- ✓ Supreme Court Rulings
- ✓ "Scott on Trusts" Law
- ✓ "Uniform Trust Code"
- ✓ "Restatement Third of Trusts"
- ✓ Internal Revenue Code 643
- ✓ Contract Law Trusts work in all 50 States

## Full Transparency

- ✓ The Trust does NOT conceal or misrepresent
- ✓ All income and expenses are shown and reported on annual 1041 tax returns

**None of the thousands of returns that  
have been prepared by our accountants  
have EVER BEEN FLAGGED FOR AN  
EXAMINATION!**



## Tax Avoidance –IRS Handbook

The Department of the Treasury, IRS Handbook for Special Agents 412, Tax Avoidance is not a criminal offense.

**"Any attempt to reduce, minimize or alleviate taxes by legitimate means is permissible"**



☎ 414-269-2600  
✉ [adam@deferflow.com](mailto:adam@deferflow.com)



## History of Our Practitioners Trust Format

- ✓ In 1867 Rockefeller utilized of a version of this type of contract law trust
- ✓ The Law Firm Registered Copyrights granted in 1999
- ✓ These trust formats have been in use for over 50 years
- ✓ Legal Opinions updates 2003, 2014, 2017, and current opinions available under retainer
- ✓ Over 55,000 of our Trusts are currently in existence
- ✓ Over 10,000 Returns filed with ZERO Audit reviews
- ✓ Designed by a Collaboration of Tax Attorneys, CPA's, Trust Attorneys, Contract Attorneys, it took over a decade to perfect the documents

## What Makes Our Trust Unique?

It complies with:

- 1 Irrevocable
- 2 Spendthrift Provision
- 3 Discretionary
- 4 Non-Grantor
- 5 Complex with Simple Provisions

## What Makes Our Trust Unique?

- 1 Trustee (YOU or TDS) Manages assets, makes investment, and banking decisions
- 2 Compliance Overseer – Most powerful role - (YOU) Adds and removes trustees and beneficiaries

## BENEFITS / OUTCOMES

- ✓ Tax Free access to funds via Demand Note
- ✓ Complete Control
- ✓ Tax Deferral
- ✓ Investment flexibility – any asset type
- ✓ Protection
- ✓ Wealth transfer
- ✓ Many Expenses payable by trust
- ✓ Charitable pursuits
- ✓ Many applications

## Types of Trusts

Pairing multiple trusts together for a complete tax plan is recommended

- 1 Legacy "Beneficial" – tax advantaged
- 2 Business
- 3 Charitable
- 4 Real Estate
- 5 Investment



To Learn more contact Adam Ausloos TODAY at

📞 414.269.2600 or email at ✉️ [adam@defernew.com](mailto:adam@defernew.com) today!

Visit [www.defernew.com](http://www.defernew.com)



Disclosure: This article is not tax, legal, or other professional advice and cannot be relied upon for any purpose without consultation and advice from a retained professional.