<u>Five Steps to Getting Started With Your Trust</u>

(Whether you Need a Personal Trust, Business Trust, a Private Family Foundation, or a Combination of Trusts)

First, I want to personally applaud your decision to accept the invitation from Real Estate Investing for Women and Moneeka Sawyer. Moneeka will be very excited that you've chosen to move forward with your Trust! You are truly a Blissful Investor! I look forward to welcoming you to the Abundance Group Trust Family very soon!

How do you know which Trust Package you need?

At a minimum, you'll need a Personal Trust. But depending on your situation, you might also need a Business Trust and/or a Private Family Foundation.

What determines the Trust(s) you need is the type of income you have. The IRS classifies "income" into "buckets" which consist of W2 income, Capital Gains Income *(ie the profit you make on a Capital Asset)*, Passive Income *(which is typically rent and lease income, royalties, or licensing fees)*, or Active Income *(ie from a brick and mortar business, from short term rentals of less than 31 days, or from service businesses).*

What kind of income do you have? If it is…

- Passive Income or Capital Gains Income only - *You'll need a Personal Trust*
- Active Business Income (ie from a brick and mortar business, from short-term rentals of less than 31 days, or from service businesses) - *You'll need a Business Trust and a Personal Trust to get maximum asset protection, but you'll still get taxed on roughly 15%+ of the net profit from active income.* To mitigate taxes further, you'll want to add the Private Family Foundation.
- W2 Income or Active Income in a Business Trust - *You'll need a Private Family Foundation so you can reduce taxes on W2 income by 30% to 37% and/or so you can reduce taxes on Active Income earned in a Business Trust to $0!*

Here are the available packages…

<u>Personal Trust Only - Reg. $40,000</u>
Webinar Discounted Investment - Just $32,000 - SAVE 20%!

If you are unsure about what Trust Package you need, then wire funds for your Personal Trust to us and schedule a call with Dr. Gina or one of the Trust Consultants. They will help you figure out which combination serves you best! It's easy to add a Business Trust and/or Private Family Foundation later!

Personal Trust Plus Private Family Foundation - Reg. $65,000
Webinar Discounted Investment - Just $45,500 - SAVE 30%!

If you want maximum flexibility, maximum asset protection, and maximum tax mitigation, and you have W2 income and passive income and/or capital gains income - but you do NOT have Active Business Income - then start with a Personal Trust and a Private Family Foundation.

TRIFECTA PACKAGE -Personal Trust + Business Trust + Private Family Foundation - Reg. $90,000
Webinar Discounted Investment - Just $60,000 - SAVE 34%!

If you want maximum flexibility, maximum asset protection, and maximum tax mitigation, and you have W2 income and/or passive income and/or capital gains income - AND you also have Active Business Income, then start with the Trifecta Package and set up your Business Trust, Personal Trust, and Private Family Foundation.

Five Steps to Getting Your Trust(s) Started

1. Decide which Trust Package you need using the above guidance.

2. Send an email to AdminTeam@AbundanceGroup.com using the SUBJECT: "Ordering My Trust". Then, in the body of the email, copy and paste the following and provide us with the requested information:

    a. TRUST PACKAGE:
    b. PRICE:
    c. YOUR NAME:
    d. YOUR CELL:
    e. YOUR EMAIL:
    f. NAME ON BANK ACCOUNT YOU'LL USE FOR YOUR WIRE:
    g. REFERRED BY: Moneeka Sawyer

    Also, include a signed copy of this document when you send us your email. It is for Acknowledgement of what's included with each Trust.

3. Wire your investment to us using the following Wire Instructions:

    Beneficiary
    Account Name: Abundance Group Trust
    Account Number: 02100082203
    Account Address: 2745 1st St., Apt 2001, Fort Myers, FL 33916

    Beneficiary Bank
    Name of Bank: Prime Alliance Bank
    Bank Routing Number: 124303081
    Bank Address: 1868 S 500 W, Woods Cross, UT 84087

4. Schedule a 30-minute call with Dr. Gina Gaudio-Grace or one of the Trust Consultants to go over how you'll structure your Trust(s). You can do so at www.AbundanceGroup.com/schedule.

5. Once we receive your wire and the email from #3 above, we will send you a New Client Questionnaire (NCQ). It will be sent via email. The email will come from RightSignature.com. *It may go into your spam folder so please watch for it!*

Complete the New Client Questionnaire asap! Within 24 to 48 hours of your submitting the completed NCQ, we will obtain the EIN number(s) for your Trust(s). Ben Ford, our Fulfillment Director, will notify you once your EIN head has been created. If you don't hear from Ben, you can reach him at Ben@AbundanceGroup.com.

Once your Trust's EIN has been created, you can begin operating out of your Trust!

Ben will also include instructions for creating your Certification of Trust and Letter of Introduction and Instruction. With these 2 documents and the SS-4 Letter from the IRS, you will be able to open a bank account for each of your Trusts.

Here's What's Included With Each Trust

Included With Your Personal Trust:

1. Procurement of EIN number for your Personal Trust. You'll receive the SS-4 Letter from the IRS within 24 to 48 hours of submitting your New Client Questionnaire to us.
2. One of our tax professionals will create, prepare, and file a Trust 1041 return for your Personal Trust for 2022
3. One of our tax professionals will create, prepare, and file a Personal 1040 return for you for 2022
4. You will receive all documentation necessary to convey your assets and liabilities to your Personal Trust, including Bills of Sale, Assignment of Note, Warranty or Quit Claim Deeds, and other Asset Transfer documents
5. You will receive your individually created Personal Trust eBinder (PDF format) with all the necessary documentation for your records
6. You will receive your individually created Personal Trust Binder with all necessary documentation for your records including the custom Abundance Group Trust Keepsake Box to store your Trust in, and the Abundance Group Trust pen
7. You will receive six (6) Morgan Silver Dollars in an elegant plastic sleeve as a one-time gift from your Settlor to fund your Personal Trust and create the initial corpus of your Trust *(roughly $150 dollars in value, depending upon the price of silver)*
8. Four (4) hours of consulting with your Trust Advisor who acts as a Strategy and Implementation Coach. You can use this time in 30 minutes or 1-hour increments at any time over the next 12 months so that you're able to get advice anytime new issues arise, ie assets are bought or sold, or Trust Operation questions arise, etc.
9. You will receive our Trustee planner that outlines in detail the names, account numbers, locations of all Trust and personal important financial information and important documents, etc. so your Successor Trustees can be up and running immediately upon the death of the trustee.
10. Access to the VIP Client area where you'll find conveyance forms, recordings of the Open Office Hours Twice Weekly Calls, a database of 100+ Q&A relating to the use of your Personal Trust, and a continually growing library of articles, case studies, and other helpful information for getting the greatest leverage from your Personal Trust.
11. Our Real Online Notary will meet with you on Zoom to notarize your signature as you execute your Personal Trust Instrument.

Included With Your Business Trust:

1. Procurement of EIN number for your Business Trust. You'll receive the SS-4 Letter from the IRS within 24 to 48 hours of submitting your New Client Questionnaire to us.
2. One of our tax professionals will create, prepare, and file a Business Trust 1041 return for you for 2022

3. You will receive your individually created Business Trust eBinder with all the necessary documentation for your records
4. A review of your current business structure, and design for a new structure to incorporate the Trusts in a manner that: maximizes your tax mitigation; ensures the greatest asset protection; and minimizes operational changes to your existing business(es)
5. Asset transfer paperwork and templates for perfecting your Business Trust (ie Professional Service Agreement, Equipment and Intellectual Property Lease, Articles of Formation, Operational Rules, etc.) to be provided and reviewed by your Trust Advisor and/or Tax Professional
6. You will receive your individually created Business Trust eBinder (PDF format) with all the necessary documentation for your records
7. You will receive your individually created Business Trust Binder with all necessary documentation for your records including the custom Abundance Group Trust Keepsake Box to store your Trust in, the Abundance Group Trust pen, and a calculator
8. You will receive six (6) Morgan Silver Dollars in an elegant plastic sleeve as a one-time gift from your Settlor to fund your Business Trust and create the initial corpus of your Business Trust *(roughly $150 dollars in value, depending upon the price of silver)*
9. Six (6) hours of consulting with your Trust Advisor with your Trust Advisor who acts as a Strategy and Implementation Coach. You can use this time in 30-minute or 1-hour increments at any time over the next 12 months so that you're able to get advice anytime new issues arise in your business, assets are bought or sold in the Business Trust, or Business Trust Operation questions arise, etc.
10. Pre-planning discussion of 2023 tax strategies for you and for your Business
11. Access to the VIP Client area where you'll find conveyance forms, recordings of the Open Office Hours Twice Monthly Calls, a database of Q&A relating to the use of your Business Trust, and a continually growing library of articles, case studies, and other helpful information for getting the greatest leverage from your Business Trust.
12. Our Real Online Notary will meet with you on Zoom to notarize your signature as you execute your Business Trust Instrument.

Included With Your Private Family Foundation:

1. Set up of Charitable Trust that creates your Private Family Foundation *(referred to as your Governing Document)*
2. Application for your Foundation's Determination Letter showing that it meets the requirements of a tax-exempt 501(c)(3) organization. You'll receive the SS-4 Letter from the IRS within 24 to 48 hours of submitting your New Client Questionnaire to us. Your Determination Letter takes 3 to 4 months after the application is filed.
3. One of our tax professionals will create, prepare, and file a Business Trust 1041 return for you for 2022
4. You will receive your individually created Charitable Trust Binder with all the necessary documentation for your records
5. Education on operating your Foundation considering of a 12 Well Course taught by Dr. Gina Gaudio-Grace, Rick Scott (who is on retainer to the IRS to assist the IRS with questions related to Foundations and Taxes), and Sherry Watson (one of the two individuals who caused Comes to pass the Americans With Disabilities Act over 30 years ago)
6. Education on integrating the Foundation with your Trust(s)
7. Education on applying for Grants for your Foundation (including Google Ad Grants and government Grants)
8. Four (4) hours of consulting with your Trust Advisor with your Trust Advisor who acts as a Strategy and Implementation Coach. You can use this time in 30-minute or 1-hour increments at any time over the next 12 months so that you're able to get advice anytime new issues arise in your non-profit.
9. Tax form explanation and assistance in the preparation of the reliefs necessary for your Tax Professional to prepare your Foundation's tax return for 2022
10. Access to the Twice Monthly Live Trainings and Replays of the Trainings related to your Private Family Foundation

11. Our Real Online Notary will meet with you on Zoom to notarize your signature as you execute your Chrysler Trust Instrument.

ACKNOWLEDGEMENT

By signing this Summary of Items Included With Each Type of Trust, you acknowledge that you understand and choose the Trust Package that works best for your income. You also Acknowledge the items that are included with each type of Trust. You agree to keep your discounted investment amount confidential and not share it with anyone that you may refer to us in the future.

Terms
After we received your initial investment, we will send you a New Client Questionnaire for each of your Trusts. This is sent from RightSignature.com. When you invest in an Abundance Group Trust, it is subject to the terms in that Licensing Agreement which includes the following:

Although a great deal of processing and expense may have taken place, if the Licensee of the Trust(s) desires to cancel this License, the Licensee has the right to a full refund of the entire sum invested for the Trust(s) until the personalized documents are prepared for delivery. Once we have obtained the EIN number for the Trust, all sales are final. In any event, this Agreement of Licensee may be rescinded within three (3) days from the date of this transaction and a full reimbursement provided. The notice must be given in writing and emailed to AdminTeam@AbundanceGroup.com within three (3) business days of the execution of this document. By signing this Proposal, you agree to these terms.

10/11/2022

______________________________ __________
Dr. Gina Gaudio-Grace Date

______________________________ __________
Signature Date

BY: ______________________________
Print Your Name