Asset Protection & Estate Plan Structure

Limited Partnership™ (AMLP)

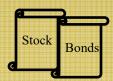
General Partners: 1% for Client(s)

Limited Partners: Majority % BT or Client(s)

Safe Assets

 AMLP Directly owns Stocks, Bonds, Notes Receivable & Collectibles





 AMLP also typically has a 100% interest in the attached LLC's which may hold any risky assets that should not be put directly in the AMLP. These may include investment real estate, airplanes, boats, rental property, etc.



Bridge Trust ® (BT)

Offshore Capacity

- The Bridge Trust is the majority limited partner of the AMLP, providing both control and location of assets to foreign jurisdiction if ever attacked.
- The Bridge Trust may also own the home for direct protection without losing any of the tax benefits of home ownership such as free capital gain and home interest deduction.
- Assets flow through to RLT at death for estate planning distributions.



Event of Crisis

Assets

"Cross the Bridge"

for protection

Event of Death

Assets pass through

RLT for Estate

Revocable Living Trust (RLT)





Business

 LLC typically owns your office building, which is then leased back to the practice. This creates nonself-employment tax income for the client, saving taxes.



(LLC #2)



Risky Assets

 LLC may own an airplane. boat, or other risky or shared asset, including investment real estate.



(LLC #3)

Real Estate

 LLC may own a separate risky or shared asset, including investment real estate.

Ultimate Distribution

- Trust owns little directly, except for personal property; however, serves the vital role of receiving all AMLP and BT assets for ultimate distribution to the Beneficiaries.
- RLT allows the use of both unified credit amounts and may split into an A/B or Q-TIP trust at death of first spouse or any other estate planning provisions or transfers.

