

TRUST & ASSET PROTECTION

By: Carl Linder, Esq.

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SPEAKER



CARL LINDER

Carl H. Linder is a partner and Co-Chair of the International Wealth and Asset Planning Group at Greenspoon Marder. Mr. Linder has advised individual and business clients regarding corporate tax, international tax, estate and gift tax and state and local taxes. Mr. Linder works closely with financial institutions and other service providers in but not limited to New Zealand, Switzerland, Luxembourg, Andorra, Bahamas, Nevis, Cayman Islands, St. Lucia, and Anguilla. Additionally, Mr. Linder focuses on international trust planning primarily in the jurisdictions of Belize and the Cook Islands. He has used his knowledge to plan for inbound and outbound transfers of property, foreign entity structures including controlled foreign corporations and other international business companies, treaty based positions, real property transfers, investment tax credits and enterprise incentive programs, personal income tax, utility and telecommunications taxes, sales and use taxes and tax related compliance issues. He has facilitated negotiations with federal and state tax authorities.



- Execution
- Litigation
- Creditors

- Partner
- Spouses
- Civil & Criminal Exposure

- Audit
- Litigation
- Creditors

- Operational
- Civil & Criminal Exposure

- Estate Tax
- Creditors
- Pre/Post Liquidity Event

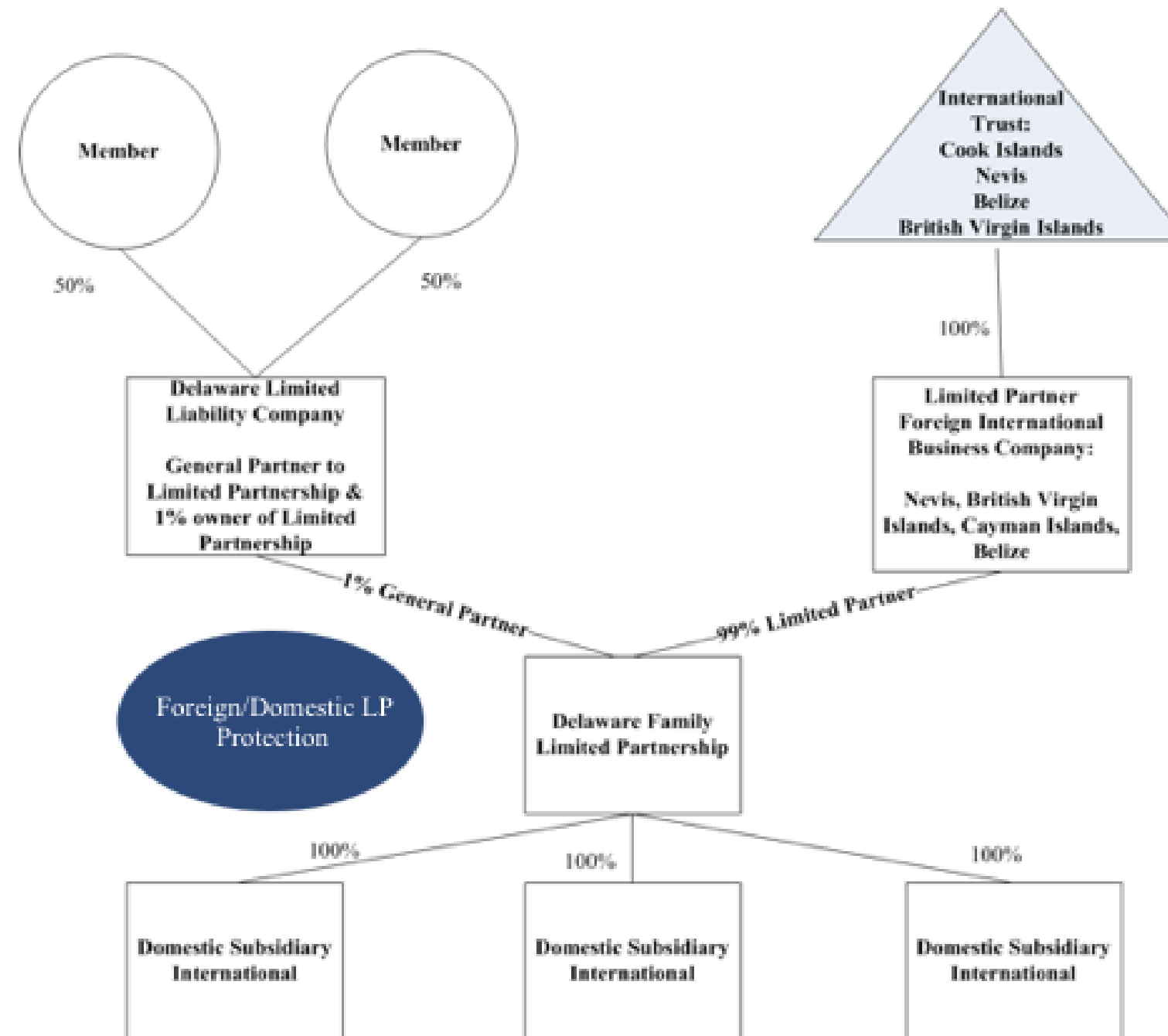
- Liquidity Exposure
- Partnership Buy/Sell

Asset Protection is the legal methodology of using Trusts, LLCs, Partnerships, Corporations and other eligible structures to diversify asset holdings from exposure of potential liabilities.

- Insulate certain assets from creditor exposure
- Provide access to capital when in need outside of the reach of other
- Allow you to defend your balance sheet in civil and criminal cases
- Family and business partnerships buy outs.
- Pre/Post Liquidity event planning
- “Family Bank” of life insurance can be used for charity or legacy purposes.

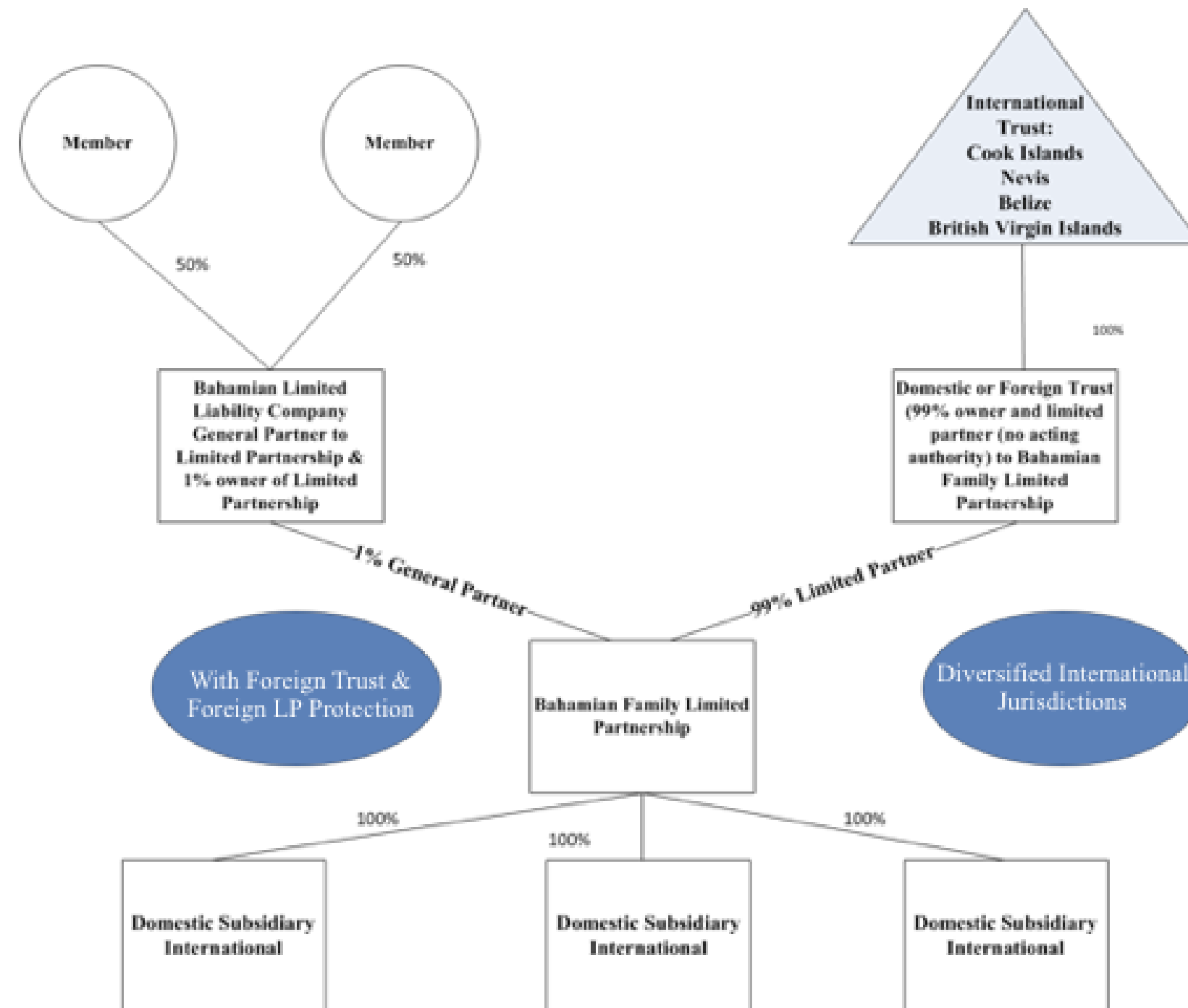
FOREIGN/DOMESTIC HYBRID STRUCTURE

Domestic Control



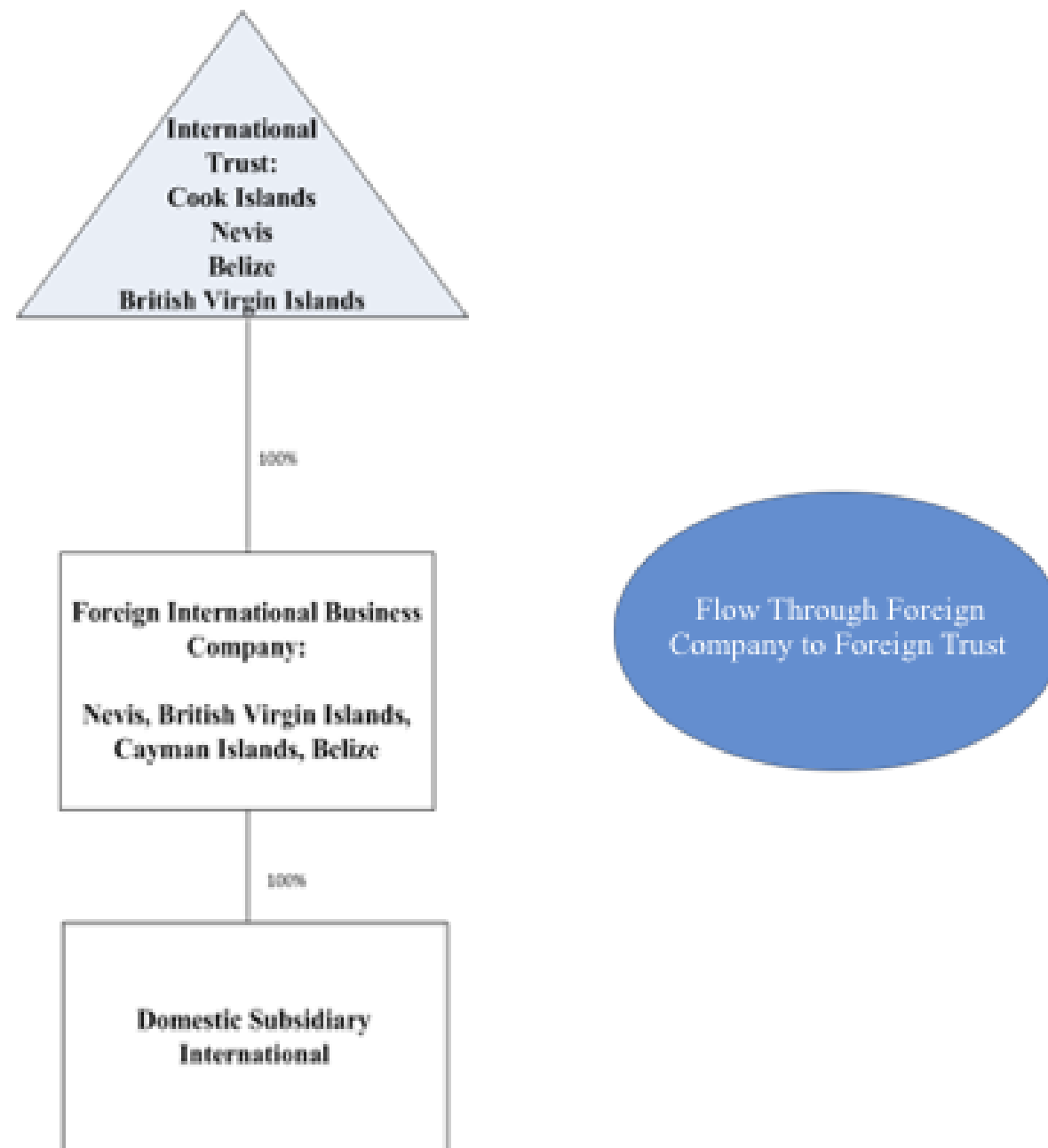
FOREIGN HYBRID STRUCTURE

Hybrid Control

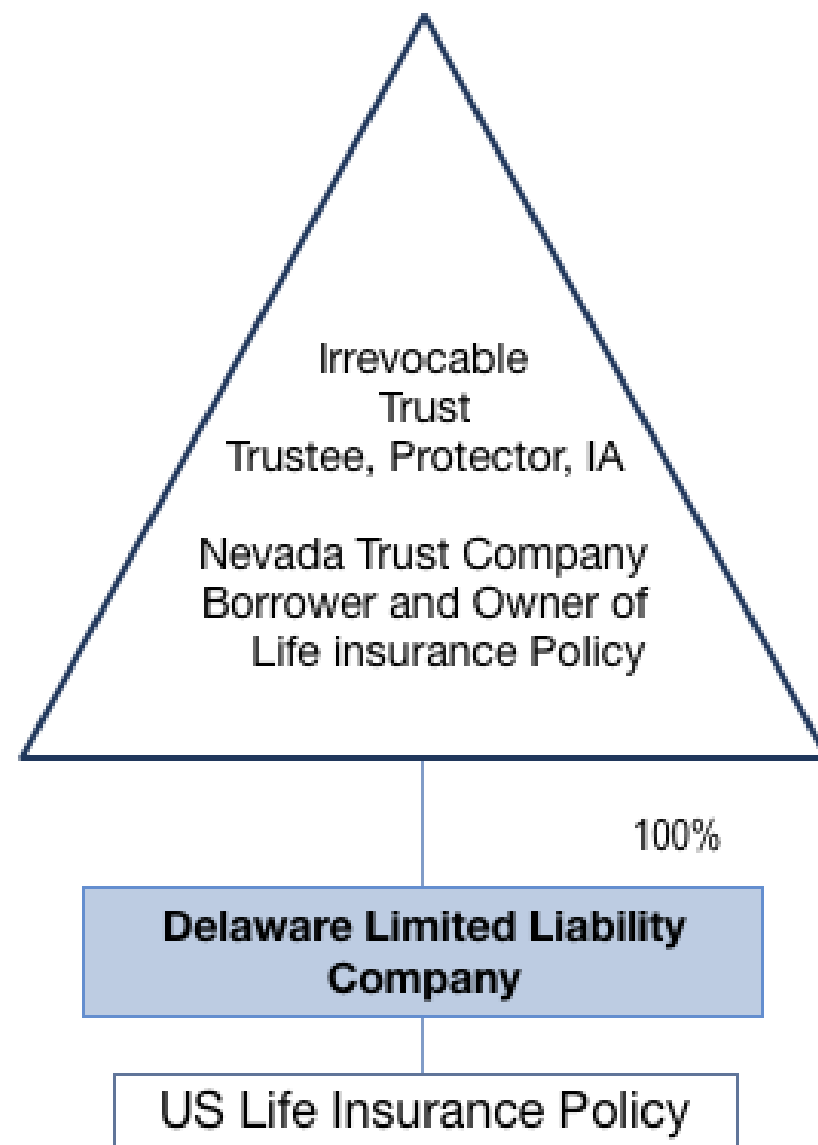


FOREIGN STRUCTURE

No Control



SELF SETTLED DOMESTIC ASSET PROTECTION TRUST NEVADA (INDEPENDENT TRUSTEE) Diversified Asset Class Structuring - Life Insurance Based Solutions



- Estate Tax Planning
- Asset Protection – In/Outside US
- Liability Management:
- Tax
- Succession + Exit Options Partnership + Family
- Corporate/Personal Obligations Guaranteed
- Tax Exempt Income Availability
- Legacy Planning
- Net-Worth Hedge
- Permission Slip to Spend



**PLEASE SUBMIT QUESTIONS
IN THE Q&A SECTION**

Thank you!

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