

The Seven Keys of Purposeful Trusts

Capturing Your Voice and Vision – How can a trust be your trust if it doesn't contain your voice? The Purposeful Trust™ is drafted in the first person tense. But more importantly text boxes capture expressions of your purposes and intent. These italicized quotes allow your heirs to hear your voice. If the first and last page were ripped off of your Purposeful Trust™ your family would still know it was your legacy for them.

Clarity and Understanding – The Purposeful Trust™ is prepared in plain English. Where tax planning creates complexity there are overview and example boxes which assist in understanding both the context and purpose of the planning. Additional clarity can be provided through a glossary of defined terms, roles and concepts.

Purpose Clauses: The Heart of the Purposeful Trust™ – Powerful purpose clauses reflect your vision for how you want your Purposeful Trust™ to benefit your family, friends, favorite charities and community.

Name: The Symbolic Power of a Trust's Name – Naming a Trust is an oft overlooked symbolic opportunity to connect the Beneficiary and Trustee to the purpose and meaning of your gift. The best name for a trust is one you choose which reflects your deepest purposes, hopes and dreams.

Guidance: The Value of Sharing Your Life Wisdom Through Guidelights for Beneficiaries and Trustee – Sharing lessons distilled from your life experiences are the best Guidelights for your beneficiaries. That life wisdom can be a bright light to illuminate their life path. Preserving reflections of the virtues you have tried to anchor your life around, or perhaps a treasure chest of your favorite quotes, could be of greater value to your family than the financial assets they inherit. Trustees also benefit greatly from clear guidance about how you envision your Purposeful Trust™ will benefit your heirs.

Transforming Heirlooms and Cash Gifts into Priceless Treasures and Lasting Legacies – When a gift of tangible personal property includes your story about the item's background or its special meaning to you, or when a cash bequest is associated with a heartfelt purpose or value, that gift is turned into a priceless treasure and a lasting legacy.

Planting Seeds of Gratitude – Expressing your love, your belief in the goodness and growth potential of your family members, and your appreciation for the memories they have given you in the text boxes of your Purposeful Trust™ are seeds of gratitude. Those seeds of gratitude will be powerful antidotes for entitlement and keys to your family's future happiness and well-being.