

LIVING TRUST PLUS® VETERANS TRUST SYSTEM

**Unprotected
Now**



LIVING TRUST PLUS®

Realty Trust



Money Trust



ONE WAY →

ONE WAY →

**Unlimited Back Door
Distributions**

- Protection Immediately from Probate PLUS Lawsuits
- PLUS Protection After 3 Years for Veterans Benefits
- PLUS Protection After 5 Years for Medicaid Benefits

**Full Use of
Realty**

Income Taxed to Beneficiaries
**\$250,000 Capital Gains Exclusion if
Residence Sold During Your Life,
Otherwise, Step-up in Basis on Death.**

**Can Go To Your
Beneficiaries**



You
Can not be trustee of Money Trust



**Who Can Give
it Back to You**

**Retirement accounts such as IRAs remain outside of the trust.
Retirement income and checking account remain outside of the trust.**