INTERVIEW AND DATA CAPTURE

The Protector

Prepared for:

**Protecting your family wealth and keeping it in your “Bloodline”**

This is one of the most important documents you could ever complete.

It will give us all the information we need to prepare the crucial documents needed to protect your personal and family wealth and to keep your wealth in your family “bloodline”.

Remember, you can change any of your wishes if your personal and family circumstances change.

**What you need to do**

put in place the Protector, a gift and loan back strategy that will extract equity from family homes, investment properties and private company interests into a special purpose Family Protection Trust with no capital gains tax or stamp duty consequences. This ensures protection after a period of time from bankruptcy, family law for second and third generation family beneficiary members and also against a contested Will.

Bloodline Focus: Importantly we can build a set of documents that ensures that your wealth is protected for the benefit of your bloodline.

If you have any questions, please do not hesitate to contact us and we look forward to receiving the following information as soon as possible so we can complete the relevant documents based on your Interview Data Capture.

*Alternatively, our legal team can complete the Interview Data Capture by way of a Zoom meeting – please contact us to arrange this meeting.*

1. **YOUR NAME AND ADDRESS**

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name (including middle name) | Age and Date of Birth | Place of Birth | Home Address |
|  |  |  |  |
|  |  |  |  |

1. **COMMON PARTIES AND ADDRESSES**

Please include in this table all those persons who may be part of your enduring power of attorney, and your estate including Executors, family members including children and grandchildren, other beneficiaries and any other person such as a friend who may act as your Executor if your family does not want to. For example, this may be: John Smith – Son – 11 Olde Road Jonestown WA 7043.

|  |  |  |
| --- | --- | --- |
| Full Name(including middle name) | Relationship to You | Contact Details (home address, email address, phone number) |
|  |  |  |
|  |  |  |
|  |  |  |
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1. **FAMILY PROTECTION TRUST**

A Family Protection Trust is a discretionary trust which provides asset protection and passes down your wealth to your bloodline children with a succession of Leading Member Family Protection Appointors. This is a strong protection against any litigation, death, dementia, divorce, bankruptcy, etc.

|  |  |
| --- | --- |
| Name of the Trust |  |
| Name of Corporate Trustee (This would be the name of the corporate trustee. Since this name must be unique, please give us 3 choices in order of preference in case one isn’t available) |  |
|  |
|  |
| Directors of Corporate Trustee |  |
|  |
| Settlor of the Trust (This would be a person who will settle the trust, a key part of establishing one, and must be a person who is not party to trust i.e., director of corporate trustee, appointor or beneficiary  |  |

When ascertaining who will be the Appointor named as Family Protection Appointor for the Family Protection Trust, the person(s) who will be in control whether individually or jointly will have to be put in below. A line of succession is VERY important to determine who will be your successor when you are no longer around. Your successor will be the person in control of trust. This also ensures you can get bloodline protection by restricting your line of succession to only your bloodline.

|  |  |
| --- | --- |
| Family Protection Appointor |  |
| Successor Family Protection Appointor |  |
| Second Successor Family Protection Appointor |  |
| Third Successor Family Protection Appointor |  |
| Fourth Successor Family Protection Appointor |  |

1. **ASSETS AND LIABILITIES – DETERMINING YOUR NET EQUITY**

Please list your assets and liabilities below so we understand the wealth that you would like to pass on to your beneficiaries. All major assets should be included such as family homes, investment properties, shares, cars, artwork, etc. Please add in additional rows to the table below if needed. In case of properties, please provide us with the title deed and also any existing mortgages. We will also need your Last Will and Testament and BFAs if any exist.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Asset | Owned by | Estimated Value of Asset ($) | Liability ($) | Net Equity | Details of the Asset |
| House -  |  |  |  |  | Folio Number –  |
| Car  |  |  |  |  | Vehicle Number -  |
|  |  |  |  |  |  |