**Post-Appointment Guide**

**Introduction**

Newfound wealth comes with opportunities, but requires responsibility to stay informed and make

good decisions to protect yourself. To transition to a wealthier life, learn how to protect and grow your

wealth. Establish short and long term priorities. Don’t be in a rush to invest, give money, or fully pay

off bills until you learn about your options. Don’t become a target.

**Personal Suggestions**

\_\_\_ As Trustee, immediately research and engage a Personal Professional Team to handle

your funds, investments, entities, structures, estate planning succession, etc.

• Common Law Lawyer • CPA / Accountant

• Asset & Trust Management • Investment & Wealth Management

• Private Banker • Real Estate Agent

• Privacy and Security Services • Digital and Cyber Security

• VIP Transportation, Hotel • Diplomatic passports

• Concierge / Lifestyle Management • Insurance, Medical, Health, Fitness

• New, anonymous, and dedicated computer or tablet for online banking.

• New, anonymous, and dedicated phone and phone # for trusted individuals.

• Restrict account(s) access to authorized bank personnel only.

\_\_\_ Set up a new and proper Trust with a Trust Attorney or Trust Company:

• Based on Common Law using your Trust EIN.

• Achieve true anonymity from your assets.

• Manage your assets independent of you as Grantor.

\_\_\_ Update your QFS and other accounts as needed with your new Trust.

**Project Suggestions**

As Trustee, and with assistance from your Project Manager, immediately begin working on your

humanitarian project. Your job is to simply hire a Team to carry out your humanitarian project. Your

involvement may include additional ﬁnancial beneﬁts for you and your family.

\_\_\_ Research a Project Professional Team with your Project Manager:

• Common Law Lawyer • CPA / Accountant

• Board of Trustees / Advisors • Administrative Assistant

• Investment / Financial / Insurance Advisors • etc.

\_\_\_ Engage your Project Professional Team to:

• Devise a long-term plan to carry out your project.

• Prepare a formal presentation for project approval.

• Negotiate and assist with project funding through your Trust.

• Manage and see your project through, with some level of your involvement.

Congratulations. As a humanitarian, you have made this world a better place.