



## PURPOSEFUL TRUST™ & GIFTS MASTERY PROGRAM

### TRUSTWORK #4 – PUTTING YOUR PURPOSEFUL PLAN IN MOTION

#### PURPOSE CLAUSES – THE HEART OF THE PURPOSEFUL TRUST™

“UNFORTUNATELY, THE PURPOSES OF A GIVEN TRUST ARE OFTEN NOT STATED IN THE TRUST PROVISIONS, ESPECIALLY WITH PRECISION OR IN COMPREHENSIVE TERMS. AS A RESULT, THE ASCERTAINMENT OR CLARIFICATION OF SETTLOR PURPOSES IS FREQUENTLY DIFFICULT AND LEFT TO SOME SPECULATION...**MORE THOUGHTFUL GUIDANCE BY DRAFTERS WOULD OFTEN BE HELPFUL TO TRUSTEES, BENEFICIARIES, AND COURTS IN SEEKING TO UNDERSTAND TRUST PURPOSES AND TO CARRY OUT SETTLOR INTENTIONS...YET, IT IS IMPORTANT TO NOTE AS WELL THAT HASTY, CASUAL, OR ROTE EXPRESSIONS OF TRUST OBJECTIVES ARE OFTEN INCOMPLETE AND CAN EVEN BE SERIOUSLY MISLEADING, AND ARE THUS LIKELY TO DO MORE HARM THAN GOOD.**” **RESTATEMENT OF TRUSTS 3<sup>RD</sup>**

During the next thirty days...

I would like to ask you to begin asking your clients “Why a Trust?”. Why are they choosing to leave this gift in the legal structure we call a trust? This question applies whether your client is creating a revocable trust or a testamentary trust.

But don't just ask the question. Ask the question by giving them the attached Purposeful Visioning Exercise which has the heading “Why a Trust? Why This Trust?” Ask them to carefully consider all of the purposes they'd like their Trust to achieve.

Offer them the opportunity to create a text box in their Purposeful Trust around one of the Purposes...if they accept your invitation ask them to pretend that Purpose, the wise Trust Genie, suddenly appeared to them and says he will grant them the certainty that one, but only one, of their purposes will materialize after their death and bless the lives of their family members (or if this trust is being created for non-family members then “for your beneficiaries”). Which of these trust purposes is the most important to them as the Trust Creator?

Next ask them to consider if there is an event in their life, an example in the life of another family member, ancestor or friend, that reminds them of how important this purpose is to them. Ask for their permission to record them, or if they are uncomfortable with you recording them, ask them to reflect and write about that story or experience, and what it has taught them about the importance of the trust purpose they have chosen as the **MOST IMPORTANT TRUST PURPOSE**.

Use the log on the next page to keep track of your progress so we can discuss them in our next call and learn from your Practice.



**PRACTICE LOG**  
**TRUSTWORK #4 – The Purpose Clause**

**DATE**                      **WHAT I DID**                      **HOW DID IT GO?**                      **WHAT WOULD I CHANGE?**