Purposeful Planning Institute

Trust 101 to Trust 401 Curriculum

Trust 101: The Legal "Ins and Outs" of a Trust

1. Advantages of My Trust
2. Asset Protection Implications
3. The Roles and Responsibilities of a "Great Trustee"
4. The Role and Responsibilities of a "Great Beneficiary"

Trust 102: Financial Planning Basics for Trust Beneficiaries

1. Adopting a Personal Financial Philosophy
2. Defining Financial Planning Goals
3. Correlate the Purposes of the Trust with The Beneficiary's Financial Planning Goals
4. Budgeting, Financial Security and Accountability
5. Establishing a Pattern for Annual Review of Personal Financial Philosophy and Planning Goals

Trust 201: Investment Theory and Management from the Trust Perspective

1. Asset Allocation
2. Modern Portfolio Theory
3. Value vs. Growth Investing
4. Fundamentals of Fixed Income Investing
5. The Role of Real Estate and Other Alternative Investments
6. Investment Tax Strategies

Trust 301: Maximizing the Growth Opportunities of Your Trust

1. Illuminating the Positive Opportunities of Wealth
2. What Excites and Interests Me?
3. Goal-Setting, Life Plans, and Coaching
4. Trustee Apprenticeships and Shadowing the Trustee

Trust 302: Life Skills Seminar

1. Self-Reflection
2. Communicating With Your Trustee and Your Family
3. Thanks! How the New Science of Gratitude Can Make You Happier

4. Leveraging a Positive Attitude and a Belief in Myself
5. Fiscal Inequality in Marriage and Relationships
6. Finding Advisors Who Sit on My Side of the Table

Trust 401: How to Be a Great Trust Beneficiary – Graduate Level

1. The Yin/Yang of Dream and Stewardship
2. Mastering the Magic of Powers of Appointment
3. Selecting and Working with Investment Managers
4. Opportunity Grants and Family Bank Loans and Investments

Trust Creator's Challenge to All Beneficiaries: The first generation makes it; the second generation grows it.