Medical Providers: Text to these 3 numbers to participate during this session with questions or comments

801-691-3292
801-369-1690
208-680-8186
The Strategy and Solution To...

- Protect Against Lawsuits
- Protect Your Personal Estate
- Increase Your Tax Savings
- Protect Your License

Your Presenter:
Natalyn O. Lewis
Why Do We Choose to Settle?

Time  
Cost  
Emotional Strain

What is YOUR Number?
What Was MY Number?

$25,000 to make it NEVER happen again!
Who Loses in a Lawsuit?

• Do you lose if you settle?
• Do you lose if you fight?
• When do you lose control?

The ONLY way to win is to remain in control by being prepared ahead of time.
Legally Mine: Your Asset Protection Specialist

- Serving Medical Professionals for over 40 years
- 12 year unique, rock solid strategy
- Over 12,000 medical professionals
- **NO** lawsuits continue
- Our mission: PROTECT YOU
- Dramatic **tax savings**
  - W-2/1099 = $10-12K/year
  - Own Practice = $15-20k/year
Are Americans Litigious?
100 Million Lawsuits Last Year

5% of World’s Population
90% of the World’s Lawsuits
Why So Many Lawsuits?

• USA Today article
  “Best way to get rich…SUE!”

• “Because you have more than I do and I need it more than you do.”
Why is it Getting Worse?

- Nation is run by attorneys
- No ramifications for suing
- More suits every year
- Increased odds of losing
- 7 out of 10 lawsuits award a settlement of $3,000 - $75,000
- Medical professionals have 50% chance of being sued
Do YOU Want to Beat the Odds?

4 Key Strategies

- Uniquely structured entities
- Supreme Court backed
- With massive tax advantages ($10,000+/annually)
- Fully executed (3-4 hours of your time)
How Does It Work?

**CAUSE**
You CANNOT control

**MOTIVATION**
You MUST always control
What Motivation Do YOU Have on the Table?

- Bank Accounts
- Investment Accounts (Stocks/Bonds)
- Life Insurance Policies
- Retirement Accounts (some states)
- Cryptocurrency
- Gold/Silver
- Artwork
- Jewelry
- Cash in a safe
- Valuables in your home
- Other items…
What if you could put 99% of your safe assets in a vault and you were the ONLY one who had the key?
STRATEGY #1
Family Limited Partnership (FLP)
Family Limited Partnership

General Partner Owns:
- 100% Control
- 100% Liability

Limited Partners own:
- NO Control
- NO Liability
“Legally Mine has been extremely professional and thorough I assessing my needs and the needs of my family and business. My only regret is that I did not use them years ago and if so, I would have been in a much better situation today. My blessing is that I now have them on my side to protect me and my family. They think of Everything and are fantastic at communicating and making sure you understand the advice they are giving and what they propose to protect you…”

Dr. Makarita
What Other Assets Do **YOU** Have on the Table?

- Home
- Rental Property
- Other Property
- Cars
- Business Interests
- Equipment
- Land
- Office
- Firearms
- Medical equipment
- Boats
- RVs
- Outdoor Vehicles/Toys
- More
STRATEGY #2
Individual Entities for EACH Asset

FLP
STRATEGY #2
Individual Entities for EACH Asset

- Home, LLC
- Boat/RV/Toys, LLC
- Equipment, LLC
- Office, LLC
- Rental Property, LLC
- Other…, LLC
Example

Single LLC
Multiple LLC’s
Protect High-Risk Assets

LLC #1  LLC #2  LLC #3
Who Uses This Strategy?

Why Aren’t YOU?
When there is NOTHING to get, there is NO lawsuit!

99% Safe Assets Locked In FLP

100% High-Risk Assets Protected by LLCs
Laws to get AROUND or THROUGH Your Asset Protection

- Judges can “pierce the corporate veil” in “closely-held” corporations

- In 45 out of 50 states a judge can dissolve your entity?
STRATEGY #3
Alaskan Holding Company
Alaskan Holding Company

- Anonymity Clause
- No Dissolution
- Not likely to change!
Trial Attorney’s Answer…
Pass a Law to Take Control: The Charging Order

Passed in each individual state, gave the Judge the right to force a Pro-Rata Distribution and order the defendants share of the income to the plaintiff.
STRATEGY #4
Non Pro-Rata Distribution

Alaska HC  FLP
LLCs
Non Pro-Rata Distribution

NON-Pro-Rata Distribution Clause stipulates that *only* the General Partner can order a distribution.
Trial Lawyers Fought Against Non Pro-Rata Language

Supreme Court ruled 9-0 in favor of the Non Pro-rata Language for our Clients!
Non Pro-Rata Language Creates a HUGE Advantage!

IRS Ruling 77-137

A plaintiff using the charging order will have to pay income tax on ANY monetary judgement even if there is no distribution from the defendant.
Let’s Have Fun…Let’s Talk Taxes

“It is the responsibility of every American citizen to ensure they do not overpay their taxes.”

Internal Revenue Service
How can YOU pay less in taxes?

- Leverage your asset protection
- Tax Advantaged Estate Planning
Estate Planning: Living Trust

- Protect everything AFTER death
- Not disputable
- Avoids PROBATE!
How do you capture ALL your Tax Benefits?

- Estate Planning (Living Trust)
- FLP
- LLCs
- Holding Company
- Other Entities

Tax Strategist!
Some Tax Strategies

• IRC Section 280(a)(g) Renting Home for business meetings

• Income Shifting for College and Minors

• FICA Tax Reduction Using an S-Corporation Salary

• Captive Insurance Plan Ownership

We work with your CPA to identify $THOUSANDS of dollars in tax savings!
✓ Asset Protection
✓ Estate Planning
✓ Tax Strategy
✓ Tax Savings $10k+
Regular Attorney: $25,000+

- Estate Planning: $5-10K
- FLP: $7-10K
- LLCs: $2K Each
- Holding Company: $2-3K
- Other Entities: $2-3K

Ala Carte, Billed by Hour
One Price: $13,800

- Asset Protection
- Estate Planning
- Tax Strategy
- Tax Savings
- Peace of Mind
- And more
License Protection

- HIPPA, OSEA, Medicare automated compliance
- SHIELD for malpractice mitigation
One Price: $13,800

✓ Asset Protection
✓ Estate Planning
✓ Tax Strategy
✓ Tax Savings
✓ License Protection
✓ And more
Event Price: $8,400

- Asset Protection
- Estate Planning
- Tax Strategy
- Tax Savings
- License Protection
- Tax Savings Guarantee
- And more
$8,400 Tax Savings Guarantee

✓ You WILL save $8,400 on your taxes or we will give you back the difference

✓ You redirect $8,400 of tax dollars to pay for your estate planning, asset protection, tax strategy, license protection, and management

✓ You then receive $8,400 of tax savings, or we write you a check for the difference

YOU WILL NOT PAY FOR THIS!
“The staff was personable and quick to respond, and they accounted for much more than I had anticipated. Our accountant has been very pleased...in the end we are saving more than TWICE the cost of the program in tax savings each year. I am VERY happy with the outcome and have recommended Legally Mine to all the other professionals in my association.”

Dr. Mac
$8,400 Tax Savings Guarantee

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✓ You then receive $8,400 of tax savings, or we write you a check for the difference.

YOU WILL NOT PAY FOR THIS!
$8,400 Break Down

$6,000 = Pay it Once and NEVER Again
- Unlimited Entity Creation (now and in the future)

$2,400 = 1-Year of Premium Plus Services
- Personalized Asset Protection Strategy
- Management of Your Asset Protections (minutes, renewals, consulting)
- Personal Tax Reduction Strategy
- Access to staff, attorneys, and tax strategist (Your estate, asset, and tax attorneys on retainer)
- HIPAA, OSHA & Medicare Automated Compliance System
- SHIELD License Protection (Malpractice Risk Mitigation)

$8,400 Tax Savings Guarantee or your money back
Hire Us Today…
We Start Now!

✓ 60-80 hours of our time
✓ 3-4 hours of your time
✓ 2-3 months to completion
Event Price: $8,400

✓ Business expense
✓ Tax Deductible
✓ Income generating through tax Savings
✓ Family Benefits (you and spouse)
“As surgeons, we spend a lot of time caring for other people. For Example, did Mrs. Jones get her Coumadin or did Mr. Smith get his Doppler? One thing we often forget, is to remember to take the time to take care of ourselves and our families. Legally Mine was first suggested to me by my accountant. He thought their asset protection and tax strategies would be an ideal way to limit potential litigation and minimize tax liability.
“But it wasn’t until I heard their presentation at an Orthopedic course in Las Vegas, that I realized they would be an integral part of my estate and tax planning, asset protection, and malpractice mitigation. After hearing the presentation, I immediately signed up for the service and it has exceeded my expectations. The staff made it painless to manage, handling everything from entity creation to running legally required advertisements in public newspapers. When the plan was finalized, it was presented in a binder with step by step instructions which I reviewed with Legally Mine’s legal team.”
While most practicing physicians understand the importance of asset protection, so few take the time to act on it, until it’s too late. That’s why I chose Legally Mine to set up my plan, allowing me to focus on my practice. Now that my assets are protected, my estate is in order, and I have an entity lawyer on retainer for all of my corporation’s needs, I can get back to worrying about Mrs. Jones.”

Dr. Bryan Hanypsiak
Editor-in-Chief, The American Journal of Orthopedics
Do you want to be forced to find your number when you know $8,400 is a way out?

$8,400

✓ Asset Protection
✓ Estate Planning
✓ Tax Strategy
✓ Tax Savings
✓ License Protection
✓ Management
✓ Tax Savings Guarantee
✓ Fully Tax-Deductible