



The Fortress Trust

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"Building a Fortress Around Your Family"

We welcome you to consider membership in The Fortress Trust. Fortress members have united to find the best ways to legally protect their assets and their incomes. We welcome into our membership those people who have a common goal of protecting their assets and legally lowering their taxes, through mutual assistance of the association, and to promote the public welfare through education regarding these vital issues. By working politically through legislative advocacy to change laws that are fundamentally unfair to the American family, Fortress calls for the abolishing of the federal estate tax and the federal gift tax, and an overhaul of the federal system of taxation, a reform of probate laws and the reform of tort laws. Additionally, Fortress exists to minimize the impact of these unfair burdens and unreasonable threats to the assets of its members.

Taxes

The government claims that its system of taxation is "fair". However, the vast majority of Americans strongly disagree. We face a multitude of taxes - income tax, capital gains tax, gift tax, federal estate tax, and many more. The top accounting and financial firms in the country have helped the richest Americans find ways to substantially lower their tax bills. However, many middle class business people just don't have the same resources as the "super wealthy" and consequently don't have the opportunity to learn of such strategies. Nevertheless, there are strategies that can be used by people who are not "super rich" to still significantly lower their taxes. Fortress has discovered and researched a number of such opportunities and makes this information available to its members. It IS possible to legally lower your taxes, by a significant amount, when you have the right advice.

Unforeseen Litigation

America is the most litigious country on the planet! Fortress has researched a number of very effective strategies for protecting assets from unforeseen litigation. You do not have to be "super wealthy" to take advantage of these strategies. Fortress makes this information available to its members.

Probate

The American Association of Retired Persons (AARP) conducted a two year study of probate, and has described it as "costly, slow, and outmoded ... a sad state of affairs." Yet probate only happens to the estates of people who have not taken specific steps to avoid probate. Fortress has researched the various methods used to avoid probate and provides its members with information on the most effective strategies.

Additional Benefits

Some of the additional benefits of membership in Fortress includes the opportunity to attend educational seminars on the operation and implementation of various types of programs for achieving the objectives of Fortress, and the opportunity to receive educational newsletters from Fortress.

One of the most important benefits of membership in Fortress is the provision of a complete and detailed Personalized Financial Plan. Through a strategic alliance with one of the top financial service firms in the country, Fortress provides its members with their own Financial Plan to enable them to have the professional advice they need to address their needs and goals in important areas such as estate planning, taxes, insurance, college funding, and many other vital areas.

Notice

The Fortress Trust does NOT provide or recommend any specific insurance or investment products. Neither does Fortress provide legal or accounting advice. Furthermore, Fortress does NOT provide any legal document preparation. However, because we are a membership organization, Fortress can recommend attorneys who we believe are best suited to assist our members to evaluate and implement the strategies and recommendations that Fortress makes to its members. Fortress has identified a number of such attorneys, whom we are happy to recommend to our members.