

SPENDTHRIFT TRUSTS: PROTECTING LOVED ONES FROM THEMSELVES



THE CONCERN

Concerned about leaving an inheritance to a loved one with money issues—addiction, poor judgment, or impulsivity?

You don't want to disinherit them or cause harm.



HOW IT WORKS

Who is involved:

- **Grantor**
The person who creates the trust and funds it.
- **Trustee**
Manages the trust and controls distributions.
- **Beneficiary**
Receives distributions under specific terms.



WHY LEGAL GUIDANCE MATTERS

An experienced estate planning attorney ensures:

- Your wishes are enforceable
- The trust is properly structured
- Your loved one is protected



THE SOLUTION

A Spendthrift Trust

A legal tool in estate planning designed to:

- Control distributions
- Shield funds from most creditors
- Prevent misuse



BUILT-IN PROTECTION

A Spendthrift Trust protects assets by limiting a beneficiary's direct access and shielding funds from creditors.

Distributions are controlled by a trustee and can be made on a schedule, for specific needs, or upon meeting certain conditions.

CAPROCK

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