

Client Name: _____

How did you hear about us? _____

ALL INFORMATION IS STRICTLY CONFIDENTIAL

MAILING/BILLING ADDRESS	
Street Address / P.O. Box:	
City:	State:
Zip:	County:

YOUR PERSONAL INFORMATION		
Full Legal Name:		
M F	Date of Birth:	REQUIRED [] YES I am a US Citizen or Resident Alien (Green Card)
Occupation:	Employer:	
Home Phone:	Cell Phone:	
E-mail:		
Marital status Single Married Separated Divorced Widowed		

SPOUSE/DOMESTIC PARTNER INFORMATION		
Full Legal Name:		
M F	Date of Birth:	REQUIRED [] YES I am a US Citizen or Resident Alien (Green Card)
Occupation:	Employer:	
Home Phone:	Cell Phone:	
E-mail:		
		REQUIRED – Date of Marriage/Domestic:

PAYMENT INFORMATION

What type of payment do you plan on using? Circle One: VISA, Mastercard,
Check

NAME ON CARD: _____

BILLING STREET ADDRESS:

(If different from above) _____

BILLING CITY, STATE, ZIP: _____

CARD NUMBER: _____

CARD EXPIRATION DATE: _____

CVV CODE (3 digit code on back): _____

THIS UNIQUE TRUST IS AN ATTORNEY-PREPARED TRUST PROVIDED TO OUR CLIENTS TO ASSIST IN PLANNING FOR CERTAIN FIREARMS AND RELATED ITEMS. THIS TRUST DESIGN INTENTIONALLY PROVIDES ONLY A LIMITED NUMBER OF CUSTOMIZATIONS TO KEEP THE COST DOWN. DISCUSS CUSTOMIZATION SERVICES WITH ONE OF OUR ATTORNEYS.

NAME OF TRUST: _____ **TRUST**

Using your name or last name visibly ties you to the trust. Many clients add words such as Gun, Firearm(s), or Armory in the title.

DATE TO BE SIGNED: _____ (if known)

TRUST DESIGN

CHECK ONLY ONE:

Creation of New Trust

OR **Restatement of Existing Trust**

Original Trust Date: _____

Grantor: _____

Original Trustee: _____

Current Trustee: _____

FAMILY INFORMATION

I am not now married.

OR

I am married and my spouse's name is _____. Any reference in this agreement to "my spouse" is a reference to this person.

AND

My spouse is a U.S. Citizen

OR My spouse is NOT U.S. Citizen

PROVIDE NAMES AND BIRTHDATES OF CHILDREN OR PUT "NONE"

**MERE ACCESS TO YOUR FIREARMS IS THE SAME AS ACTUAL POSSESSION...
DISCUSS THIS ISSUE WITH YOUR ATTORNEY IF IT APPLIES IN YOUR
SITUATION!**

CIRCLE ONE IF APPLIES: A SPOUSE or THIS PERSON:

_____ has access to my firearms.

Person circled above regularly uses my firearms, has access to the, and/or we own a number together.

OR Person circled above merely has access to my stored firearms.

OR Person circled above has no access or independent use of my firearms.

SUCCESSOR TRUSTEE INFORMATION

In the event of your death or incapacitation, who would you want to take over managing your trust assets?

1. _____; then

2. _____; then

3. _____; then

4. You may provide more names if you wish; additional successors will be appointed by reference to your other estate planning documents, or if not, by your State law.

DISTRIBUTIONS AT DEATH

#1: SPECIFIC GIFTS OF ONE OR MORE FIREARMS

A blank “tangible personal property memorandum” will be provided for you to complete and update at any time. With it you may identify specific firearms or accessories *owned by this trust* that your Trustee would distribute to named individuals at your death.

#2: MARRIED ONLY – CHECK HERE TO PROVIDE FIRST FOR SPOUSE

Check ONLY if you want your trust to continue for your spouse (BUT NOT IF YOU SIMPLY WISH TO GIVE FIREARMS OUTRIGHT, I.E. PERSONALLY)

NEXT SELECT ONE BELOW:

All to spouse.

OR

_____% to spouse, remainder under #3 below.

#3: REMAINDER WILL PASS BY PERCENTAGE SHARE

Please complete the following Worksheet to distribute remaining assets by percentage.

REMAINDER BENEFICIARY WORKSHEET

Remainder beneficiaries receive all assets that are left over after satisfaction of specific gifts.

Name/Relationship	Insert "D" or "B"*	Share
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
_____		____%
TOTAL		100%

* "D" means "or to descendants" while "B" means "or to other named beneficiaries." If desired, provide separate share trusts or common dynasty trust details on Page 7.

#4: REMOTE CONTINGENT BENEFICIARIES

If no beneficiaries remain, then your main estate plan or state law will control. If you wish to change this please contact our office to discuss a reasonable fee to customize your trust..

REQUIRED EXHIBITS & SCHEDULES

We provide certain Exhibits and Schedules for your GunDocx® Trust. Referenced Exhibites and Schedules are required to avoid having your trust returned by BATFE as incomplete.

Exhibit 1 identifies remainder beneficiaries. You cannot be the sole trust beneficiary.

Schedule A lists current or pending National Firearms Act assets (if any).

Schedule B is for conventional firearms or accessories. Generally it is referenced by not provided to BATFE for privacy reasons.

Your trust must be "funded" i.e. own assets to be valid. Your **non-NFA** firearms and accessories are generally assigned when the trust is created, and additional forms are provided.

Transfers of **NFA firearms** require a BATFE approved transfer in order for legal title to vest in the trust, but your trust can own the right to receive an approved NFA firearm at the time you pay your gun seller, or to collect a refund. **Schedule A must list pending NFA firearms!**