Rust Law PLLC

659 Hayward Ave N. Oakdale, MN 55128
612-269-8819   ben@rust-law.com

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:	

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 ME IF YOU WANT SOMETHING MORE ADVANCED.

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 (Skip to family information)

OR [___] Restatement of Existing Trust (fill out info below for your current 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 them, 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 incapacity, who would you want to take over managing the 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 - PLEASE COMPLETE BOTH #2 AND #3 BELOW

#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 after the trust is signed. 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 any assets not distributed by #1 or #2 by percentage. Remember that there may be events which would cause the intended distributions under #1 or #2 to fail so putting names and percentages here, will ensure that no matter what you have determined who will receive the trust's property. (Example, if you planned to give everything to your spouse but they die first, then the distribution to them will not take effect and you would need a backup provision.)

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.**