

Firearms Trust Questionnaire

Your Full Legal Name: _____

Complete Address: _____ County: _____

Phone: _____ Fax: _____

Email: _____

How did you hear about us? Google search Bing Yahoo

Gun shop (if so, which one?) _____

Referral _____

Name of Trust

What would you like to name your trust? Please keep in mind, if you plan on building Title II/Class 3 weapons, you will need to engrave your receiver, and these clients often like shorter names. Typically, the name of the gun trust is "YOUR LAST NAME Firearm Trust". If you would like to make it shorter, I typically use your initials with the words "NFA Trust". For example, John Smith can name his trust the "John Smith Firearm Trust" or "JSNFA trust".

Options for Your Trust

\$89 Basic Trust - We have recently reduced the cost for a standard attorney-drafted Gun Trust. This includes support by our knowledgeable office staff and a 10-minute consultation with a NFA Trust Attorney. The basic attorney-drafted NFA Trust is \$89, and includes instructions on how to complete the process of obtaining a title II weapon. This will allow you to own Title II weapons, and pass them down to someone.

\$109 Basic Trust with Privacy Package - The trust with the privacy package is structured differently, and uses "assignment sheets". The main benefit is that these assignment sheets are not part of the trust, so if you intend to place your entire collection in the trust but would like the contents of the trust to remain private, you should select this option, as the no one will be able to see your collection listed on the last page of the trust.

\$189 Advanced Trust – Unlimited legal advice regarding your Gun Trust, provided by an NFA experienced Attorney. This includes the privacy package.

\$289 Multi-Generational (Perpetual) Trust – This allows you to pass the items through future generations of your family as they are born. This includes the privacy package and unlimited consultations with a NFA trust attorney.

\$289 Asset Protection – Some of our clients have concerns about asset protection, and would like to insulate their firearms from lawsuits or divorce. In this instance, an Irrevocable Trust may be the answer. You should be aware that making future changes to an irrevocable trust is much more difficult than with a revocable trust, so careful thought should be given as to the structure of your trust. Total cost is \$289.

\$389 Multi-Generational Trust with Asset Protection

You will be the grantor and initial trustee of your trust. In addition, you will also need to name a Trustee (either co-trustees, successor trustees, or both) and Beneficiaries of this trust.

If only naming 1 trustee and beneficiary, they **cannot** be the same person
Trustees

The Trustees need to meet the following criteria to be able to serve:

- Must be of legal age (age 21 or older)
- Must have no prior felony convictions
- Must have no prior mental health issues

Please note:

1. Only you and the Co-Trustee(s) will have possession of the items in your trust
2. You do not need to name yourself as co-trustee

Co-Trustee(s) – *OPTIONAL, NOT REQUIRED TO COMPLETE TRUST**

Co-Trustees are people who will serve as trustees simultaneously with you. Co-trustees will have the same rights of possession as you, and they will be able to use/sell/control the weapons in your trust. This is not highly recommended unless your co-trustee is someone who is highly trusted. Typically for adult children or a spouse who also like to shoot. (If naming more than 2, attach separate page)

TRUSTEE #1	TRUSTEE #2:
NAME:	NAME:
ADDRESS:	ADDRESS:

Successor Trustees

Successor Trustees are much more common. Successor trustees have no current rights to your property in the trust, however in the event something should happen to you, the successor trustee(s) would gain possession of the items in your trust, and would carry out your wishes. It is a good idea to name at least 2 successor trustees. (If naming more than 2, attach separate page)

TRUSTEE #1	TRUSTEE #2:
NAME:	NAME:
ADDRESS:	ADDRESS:

If you have named more than one, do you want them serving at the same time, or in succession? If creating a Dynasty Trust, all trustees will serve concurrently automatically.

- Succession (first one serving, then next one serving)
- Concurrently (all serving at once)

Beneficiaries

The beneficiary is ultimately who will receive any proceeds if the firearms are sold, or who your trustee will deliver the trust items to, depending on your wishes. It is a good idea to name alternate beneficiaries in case your main beneficiary does not meet qualifications or precedes you in death. **You can name minors as beneficiaries, as the trust has provisions for this.** (If naming more than 2, attach separate page)

BENEFICIARY #1	BENEFICIARY #2:
NAME:	NAME:
ADDRESS:	ADDRESS:

If you have named more than one, do you want each one receiving an equal share (concurrently), or do you want the first beneficiary to receive everything, then the second, etc (succession)

- Succession (first beneficiary receives everything, then next one)
- Concurrently (all beneficiaries receive and equal share)

ONLY If Creating a Multi-Generational Trust – would you like the beneficiaries to become Co-Trustees or Successor Trustees when they turn 21? (If Co-Trustees, they can use the items independently while you are alive, if successor, they will only become trustees upon your death)

- Co-Trustee
- Successor Trustee

Please briefly describe what you would like to happen to your firearms should something happen to you (i.e. would you like the trustee to keep the firearms to pass down to the beneficiary, would you like the trustee to immediately sell the firearms and give the proceeds to the beneficiary, etc). If you selected a multi-generational trust, the items will automatically be kept for future generations. If you selected a basic trust, the items will automatically go to your beneficiaries.

**WHEN COMPLETED, PLEASE EMAIL THIS FORM TO INFO@FLGUNTRUSTS.COM
IF YOU ARE UNABLE TO EMAIL THE FORM, YOU MAY FAX IT TO 727-290-4044. ONCE RECEIVED,
SOMEONE FROM OUR OFFICE WILL CONTACT YOU FOR PAYMENT, WHICH CAN BE MADE BY
CREDIT/DEBIT CARD OVER THE PHONE.**

THANK YOU FOR YOUR BUSINESS!