



ALDER LAW GROUP

TRUST PLANNING / FAMILY PRESERVATION

3216 S. Highland Dr., Ste. 201
Salt Lake City, Utah 84106

James P. Alder
jim@utahtrustattorneys.com

Voice (801) 463-2600
Fax (801) 467-1800

Client Name: _____

How did you hear about us? _____

PLEASE ANSWER ALL QUESTIONS. ALL INFORMATION IS STRICTLY CONFIDENTIAL

YOUR PERSONAL INFORMATION	
Full Legal Name:	Gender: <input type="checkbox"/> M <input type="checkbox"/> F
Name used on Legal Documents:	
Marital status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Life Partner <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	Citizenship: <input type="checkbox"/> US <input type="checkbox"/> Alien Resident OR Nonresident
Street Address / P.O. Box:	
City/State/Zip/COUNTY:	
Phone:	Email:
SPOUSE/DOMESTIC PARTNER INFORMATION	
Full Legal Name:	Gender: <input type="checkbox"/> M <input type="checkbox"/> F
Name used on Legal Documents:	
Date of Marriage/Partnership:	Citizenship: <input type="checkbox"/> US <input type="checkbox"/> Alien Resident OR Nonresident

THIS UNIQUE TRUST IS AN ATTORNEY-PREPARED TRUST PROVIDED TO INDIVIDUAL CLIENTS TO ASSIST IN PLANNING FOR NFA FIREARMS ONLY. THIS TRUST DESIGN INTENTIONALLY PROVIDES ONLY A LIMITED NUMBER OF CUSTOMIZATIONS TO KEEP THE COST DOWN. DISCUSS CUSTOMIZATION SERVICES OR A TRUST UPGRADE WITH ONE OF OUR ATTORNEYS, ESPECIALLY IF YOU DESIRE A JOINT TRUST WITH A SPOUSE OR DOMESTIC PARTNER.

TRUST DESIGN

DATE TO BE SIGNED: _____ (Leave blank if unknown)

CHECK ONLY ONE: Creation of New Bronze Trust
 Restatement of Existing Bronze Trust *(please provide a copy of the Existing Trust)*

FAMILY INFORMATION

I have no children.

Or I have children and their names are:

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Attach an additional sheet if necessary.

SUCCESSOR TRUSTEE INFORMATION

In the event of your death or incapacity, who would you want to take over managing your trust assets (much like an executor of a Will)?

1.	then
2.	then
3.	then
4.	then
5.	

Additional successors will be appointed by reference to your other estate planning documents, or if not, by your State law.

REMAINDER BENEFICIARY WORKSHEET – MUST BE COMPLETED.

Remainder beneficiaries receive all assets that are left over after satisfaction of specific gifts. If all Remainder beneficiaries are deceased, then trust assets are distributed by your estate plan.

NOTE: IN THE ‘Y OR N’ COLUMN OF THE TABLE BELOW, IF A BENEFICIARY DIES BEFORE YOU, “Y” MEANS SHARE GOES TO BENEFICIARY’S CHILDREN; “N” MEANS SHARE GOES TO THE OTHER REMAINING BENEFICIARIES.

Name	Relationship	Y or N	Share
			%
			%
			%
			%
			%
			%
			%
			%

MUST TOTAL 100%