



ALDER LAW GROUP

TRUST PLANNING / FAMILY PRESERVATION

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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 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.

TRUST DESIGN

NAME OF TRUST: _____ **TRUST**

Many clients add words such as Gun, NFA, Firearm(s), or Armory in the title.
(We recommended [First name] [Last name] NFA Trust, but it's not required.)

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

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

CHECK HERE if firearms will be stored and used in multiple states simultaneously.

CHILDREN’S INFORMATION

Child’s Name	M/F	Birthdate	H-(Husband’s) W-(Wife’s) J-(Joint)

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.	

DISTRIBUTIONS DURING LIFE

IF MARRIED -

- Spouse has NO access to my firearms. Spouse will be Cotrustee.
- Spouse HAS access to my firearms. Spouse will be Cotrustee.
- BOTH of us have access and consider them “our” firearms. We want to have a Joint Trust naming both of us as Grantors. We understand that this will make us both Responsible Persons for purposes of ATF Rule 41F for future NFA transfers.

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: IF MARRIED -

- Trust should continue ONLY for my spouse’s benefit (spouse becomes full owner.)
- Trust should continue for benefit of spouse and descendants,
 - Priority of benefits is to spouse.
 - NO priority of benefits; all receive same treatment.
- ____% continues in trust for spouse’s benefit with balance under #3 below
- DO NOT CREATE A SPOUSE TRUST.** Distribute trust property to Remainder Beneficiaries below. My spouse may or may not receive a share.

#3: REMAINDER BENEFICIARY WORKSHEET – MUST BE COMPLETED.

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

- CREATE ONE COMMON TRUST FOR DESCENDANTS.** Trust will last for multiple generations.

OR

- CREATE SEPARATE SHARES FOR THE FOLLOWING INDIVIDUALS** (Including a named gun trust) **OR CHARITIES.** Contact me to design each share and how it will pass at death of a beneficiary.

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 UNLESS YOU INDICATE OTHERWISE.

Name	Relationship	Y or N	Share
			%
			%
			%
			%
			%

MUST TOTAL 100%

DETAIL ON SEPARATE SHARES:

For each share above, include specific design information on whether distribution is outright, in a general needs trust, conservative or liberal distribution, etc.

CHECK HERE TO DISCUSS CHARITABLE FIREARMS PLANNING.

YOU CAN DONATE GUNS, CREATE A CHARITABLE ANNUITY, AND DO MANY OTHER THINGS IF YOU DO NOT HAVE INDIVIDUAL BENEFICIARIES WHO WILL APPRECIATE YOUR FIREARMS.

