



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 as signed 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)

CHILDREN'S INFORMATION

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

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.

DISTRIBUTIONS DURING LIFE

IF MARRIED, CHECK ONLY ONE!

- Spouse will have access to my firearms. I will name my Spouse as a Cotrustee once applications are approved.

- 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 AFTER DEATH

#1: IF MARRIED (CHECK ONLY ONE!)

- Trust should continue ONLY for my spouse’s benefit (spouse becomes full owner.)
- _____% 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.

#2: REMAINDER BENEFICIARY WORKSHEET – MUST BE COMPLETED.

Remainder beneficiaries inherit from the trust after your death (and death of spouse, if married).

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

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

MUST TOTAL 100%