

Phone: 407-790-9585  
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 Website: http://www.potomacguntrusts.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	Birthdate:
Occupation:	Employer:
Home Phone:	Cell Phone:
E-mail:	
Marital status   Single   Married   Separated   Divorced   Widowed	

SPOUSE/DOMESTIC PARTNER INFORMATION	
Full Legal Name:	
M   F	Birthdate:
Occupation:	Employer:
Home Phone:	Cell Phone:
E-mail:	

Children Name	Birthdate	(H)usband's/(W)ife's/(J)oint
1.		
2.		
3.		
4.		

**THIS UNIQUE TRUST IS AN ATTORNEY-PREPARED TRUST PROVIDED TO 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.**

**TRUST DESIGN**

**NAME OF TRUST:** \_\_\_\_\_ **TRUST**

**Many clients add words such as Gun, Firearm(s), or Armory in the title. (This is recommended but not required.)**

**CHECK ONLY ONE:**

**Creation of New Trust**

**OR**  **Restatement of Existing Trust**

Original Trust Date: \_\_\_\_\_

Grantor: \_\_\_\_\_

Original Trustee: \_\_\_\_\_

Current Trustee: \_\_\_\_\_

**MERE ACCESS TO YOUR FIREARMS IS THE SAME AS ACTUAL POSSESSION...  
DISCUSS THIS ISSUE WITH YOUR ATTORNEY IF IT APPLIES IN YOUR SITUATION!**

**CHECK IF SPOUSE, DOMESTIC PARTNER, ROOMMATE, OTHER has access to firearms.**

Is very involved with my firearms or we own them together

Merely has access to my stored firearms.

**SUCCESSOR TRUSTEE INFORMATION**

**In the event of your death or incapacitation, who would you want to take over managing your trust assets?**

1. \_\_\_\_\_; **then**

2. \_\_\_\_\_; **then**

3. \_\_\_\_\_; **then**

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

**IN EVERY CASE YOU MUST COMPLETE #3 BELOW.** (Names Beneficiaries after Spouse's death if Trust continues for their benefit.)

**REMAINDER BENEFICIARY WORKSHEET FOR SCHEDULE C**

Remainder beneficiaries receive all assets upon termination of trust. They must meet the requirements of legal gun ownership. For example, they must not be a felon and must be 21 years of age or older.

\*Use whole numbers only and the total must add up to 100.

<b>Name/Relationship</b>	<b>Share</b>
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
<b>MUST TOTAL <u>100%</u></b>	<b><u>100%</u></b>

**REMOTE CONTINGENT BENEFICIARIES**

Your main estate plan or state law will control if no beneficiaries remain able or willing to accept your bequest.

**VALIDITY OF YOUR TRUST (REQUIRED SCHEDULES)**

We provide certain Schedules for your Trust. Referenced Schedules are required to avoid having your trust returned by BATFE as incomplete.

Schedule C identifies remainder beneficiaries (#3 above). You cannot be the sole trust beneficiary. If you do not have an estate plan such as a will, please fill this out in order for your beneficiaries to be ascertainable by the BATFE otherwise the BATFE will return your trust.

Your trust must also be "funded" i.e. own assets to be valid. This can be, for example, one U.S. Dollar. This does not have to be attached to your trust.

Transfers of **NFA firearms** require a BATFE approved transfer in order for legal title to vest in the trust, but your trust can own the right to receive an approved NFA firearm at the time you pay your gun seller, or to collect a refund. That is why Schedule A should list pending NFA firearms! If you already own NFA firearms and would like to place them in the trust, you must pay the \$200 tax stamp for the transfer again.

**Payment: Please pay on the website first. Your trust will not be drafted until payment is received. Remember, you must email me this intake document so that I can draft your trust. Thank you!**