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SILVER/GOLD GUN TRUST WORKSHEET

Date _____ Phone: _____ E-mail: _____

First Name MI Last Name DOB

Spouse's First Name MI Last Name DOB

Street City State Zip County

Marital Status Married Single

If married, do you want your spouse to be Grantor/Trustee along w/ you? Yes _____ No _____

(*Note: Effective 7/1/2016, all Grantors & active Trustees must submit fingerprints, etc. to ATF every 2 years).

How did you hear about our firm? _____

Are you a Veteran? Yes _____ No _____

Do you consent to communicating via e-mail, including receiving your completed Gun Trust via e-mail? Yes _____ No _____

Do you have a Will? Yes _____ No _____ Do you have a Trust? Yes _____ No _____

CHILDREN

Name	Relationship	Age	Child of H, W, OR Both?

POSSESSION DURING YOUR LIFETIME

You will be given forms to authorize others to POSSESS the NFA weapons owned by your Gun Trust at any time. The Grant of Use forms allow you to designate, on your own, as many individuals as you'd like for a specified period of time (If you have designated other persons to possess via the Grant of Use forms that are active at the time of a new tax stamp application, those persons also have to submit fingerprints, etc., every 2 years. Grant of Use forms are best used for temporary short-term situations).

However, you can also name additional persons to serve as immediate Co-Trustees of your trust along with you while you are alive. In addition to being able to POSSESS the Trust's NFA weapons, these persons will also have additional powers with respect to the Trust, such as the power to purchase NFA weapons in the name of the Trust, act on behalf of the Trust regarding other Trust matters, and the ability to authorize others to possess the Trust's NFA weapons. These persons will be required to sign the trust document and submit fingerprints, etc. upon application for tax stamps. And, in order to remove them as Co-Trustees in the future, you will have to amend your trust document.

If you wish to name others to serve as immediate Co-Trustees of the Gun Trust while you are alive, please list their names below.

APPOINTMENTS

Who, if anyone, do you want to name as immediate Co-Trustees along with you?

Have the power to possess, purchase firearms, and act on behalf of your Trust along with you. See additional explanation on the bottom of Page 1.

Nomination for Successor Trustee of your Trust After You are Deceased/Incapacitated

Responsible for managing your trust assets /settling your trust after you are deceased/disabled

1 st Choice	
2 nd Choice	
3 rd Choice	

PLAN OF DISTRIBUTION UPON YOUR DEATH

#1—If you are MARRIED, do you want all trust assets to remain in your trust for the benefit/control of your surviving spouse? Yes_____ No_____

#2: SPECIFIC GIFTS OF ONE OR MORE FIREARMS BY MEMORANDUM

We provide you with an option for including a blank tangible personal property memorandum which you may use with your trust to identify and gift specific items *of tangible personal property owned by this trust only* to specific individuals. You can change this memorandum by executing a new one and signing and dating it, without having to amend your trust.

#3: DISTRIBUTION OF REMAINING TRUST ASSETS

OPTION A—FOR SILVER GUN TRUSTS ONLY—

Firearms will be distributed out of the trust and to the following individuals in the percentages indicated within a reasonable time after your death.

Name	Age	Relationship	Percentage

If a beneficiary you've named dies before you, should his or her share go to:

_____ His or her child(ren) **OR** _____ To the other beneficiaries who do survive?

OPTION B—FOR GOLD GUN TRUSTS ONLY—

Firearms will remain in the trust after your death for the use and enjoyment of the beneficiaries you specify.

You will have the opportunity to discuss any questions/specific requests with the attorney.

Do you wish to include all your children/descendants as beneficiaries after you die?

Yes _____ No _____

Additional persons you wish to name as beneficiaries, if any:

Name	Age	Relationship

At what point in time do you want the trust to terminate and the assets distributed outright to the beneficiaries?

_____ When a majority of the beneficiaries agree to terminate the trust

_____ At a different specified time as follows: _____

I hereby retain Law Office of Jennifer J. Mickelson, PC (d/b/a MoKaN Gun Trusts), hereinafter referred to as Law Office, to complete a Silver/Gold Gun Trust (circle one). I warrant that I will be responsible for payment of \$500 for a Silver Trust or \$1000 for a Gold Trust (less any applicable discounts offered in the discretion of the Law Office) upon receipt of the completed document. If I fail to make payment in full upon receipt of the completed document, I understand that I am responsible for any fees, including but not limited to attorney's fees and court costs, associated with the collection of payment, as well as a monthly late fee in the amount of \$50.00. I hereby expressly acknowledge that Law Office has advised me of the risks and benefits of executing a Gun Trust, including but not limited to the risk that the laws regarding possession, use, and transfer of firearms may change at any time. I understand that I, not the Law Office, bear the sole responsibility for funding the Gun Trust and complying with all applicable firearm laws at all times.

Signature

Date