



TAGGART LAW, LLC
Estate and Business Planning
Serving Utah and Wyoming

Your 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:		
<input type="checkbox"/> M <input type="checkbox"/> F	Date of Birth:	REQUIRED: YES I am a US Citizen or Resident Alien (Green Card)
Occupation:	Employer:	
Home Phone:	Cell Phone:	
E-mail:		
Marital status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		

SPOUSE/DOMESTIC PARTNER INFORMATION		
Full Legal Name:		
<input type="checkbox"/> M <input type="checkbox"/> F	Date of Birth:	REQUIRED: YES I am a US Citizen or Resident Alien (Green Card)
Occupation:	Employer:	
Home Phone:	Cell Phone:	
E-mail:		
REQUIRED – Date of Marriage/Domestic Prtshp:		

PAYMENT INFORMATION

Payment method: [] VISA, [] Mastercard, [] AmEx, or [] Discover, or [] Check.

NAME ON CARD: _____

BILLING STREET ADDRESS: _____
(If different from above)

BILLING CITY, STATE, ZIP: _____

CARD NUMBER: _____

CARD EXPIRATION DATE: _____

CVV CODE (3 digit code on back): _____

****You may also pay at www.gtaglaw.com by clicking on the Pay Online tab.****

TRUST INFORMATION

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. We can discuss customization once you've mailed/mailed us the form.

PROPOSED NAME OF TRUST: _____ TRUST

Using your full name or last name visibly ties you to the trust.
Many clients add words such as Gun, Firearm(s), or Armory in
the title, eg. *John Smith Gun Trust*.

DATE TO BE SIGNED: _____ (if known)

TRUST DESIGN (Check one):

[] Creation of New Trust

OR [] Restatement of Existing Trust

Original Trust NAME: _____

Original Trust Date: _____

Grantor: _____

Original Trustee: _____

Current Trustee: _____

FAMILY INFORMATION:

I am not now married.

OR

I am married, and my spouse's name is _____. Any reference in this agreement to "my spouse" is a reference to him or her.

AND

My spouse is a U.S. Citizen

OR My spouse is NOT U.S. Citizen

Provide the names and birth dates of your children/stepchildren below or put "None":

	Name	Birth Date
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____

IMPORTANT: Mere access to your firearms is the same as actual possession, so discuss the following issue with us if it applies in your situation.

Check either "spouse" or "person" if the following statement applies: My spouse or the following named person _____ has access to my firearms.

The spouse or person checked above regularly uses my firearms, has access to the, and/or we own a number together.

OR The spouse or person checked above merely has access to my stored firearms.

OR The spouse or person checked above has no access or independent use of my firearms.

SUCCESSOR TRUSTEE INFORMATION:

In the event of your death or incapacity, who would you want to take over managing your trust assets (in order of preference)?

1. _____ ; then
2. _____ ; then
3. _____ ; then
4. You may provide more names if you wish; additional successors will be appointed by reference to your other estate planning documents, or if not, by your State law.

DISTRIBUTIONS AT DEATH:

#1: Specific gifts of one or more firearms

We provide a blank “tangible personal property memorandum” 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: For married persons only—check here to provide for your spouse first

Check ONLY if you want your trust to continue for your spouse (but not if you simply wish to give him/her your firearms outright, i.e. personally)

Next select one of the following:

All to spouse.

OR

_____ % to spouse, remainder under #3 below.

#3: Remainder will pass by percentage share

Please complete the Remainder Beneficiary Worksheet on the following page to distribute any remaining assets by percentage.

REMAINDER BENEFICIARY WORKSHEET

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

Name/Relationship	Insert "D" or "B"*	Share
1. _____ / _____	/ _____	_____ %
2. _____ / _____	/ _____	_____ %
3. _____ / _____	/ _____	_____ %
4. _____ / _____	/ _____	_____ %
5. _____ / _____	/ _____	_____ %
6. _____ / _____	/ _____	_____ %
7. _____ / _____	/ _____	_____ %
8. _____ / _____	/ _____	_____ %
9. _____ / _____	/ _____	_____ %
10. _____ / _____	/ _____	_____ %
TOTAL		100%

* "D" means "or to descendants" while "B" means "or to other named beneficiaries."

#4: Remote contingent beneficiaries

If no beneficiaries remain, then your main estate plan or state law will control. If you wish to change this please contact our office to discuss a reasonable fee to customize your trust.

REQUIRED EXHIBITS & SCHEDULES:

We provide certain Exhibits and Schedules for your Gun Trust. Exhibits and Schedules must be referenced in your gun trust to avoid having your trust returned by BATFE as incomplete.

Exhibit 1 identifies remainder beneficiaries. You cannot be the sole trust beneficiary.

Schedule A lists current or pending National Firearms Act (NFA) assets, if any.

Schedule B is for conventional firearms or accessories. Generally it is referenced in the trust but not provided to the BATFE—to preserve your privacy.

Your trust must be "funded" i.e. it must own assets to be valid. People generally assign their **non-NFA** firearms and accessories to the trust when it is created. We provide additional forms for this purpose.

Transfers of **NFA firearms** to the trust 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 as well as the right to collect a refund. **Schedule A must list pending NFA firearms!**