

LAW OFFICES  
**GARNER LAW FIRM, P.C.**  
ATTORNEYS AT LAW  
P.O. Box 120727  
ARLINGTON, TEXAS 76012

GUY GARNER

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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:		
<input type="checkbox"/> M <input type="checkbox"/> F	Date of Birth:	Country of Citizenship:
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		Date of Marriage:

What type of payment do you plan on using? Circle One: VISA, MasterCard, 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): \_\_\_\_\_

Amount of charge: \$1000.00 minimum, final fixed fee will be quoted upon our review of your completed Gold Trust intake form. No fee over \$1000.00 will be charged without your prior written approval.

**WARNING! ONLY SIGN THIS TRUST IF IT ACCOMPLISHES YOUR INTENT. 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 ME .**

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

**DATE TO BE SIGNED:** \_\_\_\_\_

**CHECK ONE:**

**Creation of New Gun Trust**

Grantor(s) (You & Spouse if married): \_\_\_\_\_

Initial Trustee

(usually yourself): \_\_\_\_\_

**Restatement of Existing Gun Trust**

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

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

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

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

**FAMILY INFORMATION**

**CHECK ONE:**

I am not now married.

I am married and my spouse's name is \_\_\_\_\_. Any reference in this agreement to "my spouse" is a reference to this person.

**CHECK ONE:**

I have no children.

I have children and their names and birthdates are:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**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

Then, additional backup successors are appointed in your trust as follows:

- Disability:      the Trustee of your revocable living trust OR  
                          the Agent named in your General Durable Power of Attorney or your  
                          Guardian appointed by a Court.
- Death:            the Trustee of your revocable living trust OR  
                          the Personal Representative nominated in your Will or as appointed by a  
                          Court should you die without a Will.

**DISTRIBUTIONS AT DEATH**

**#1: 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.

**#2: SPECIFIED GIFTS OF ONE OR MORE FIREARMS**

We also provide you with the option to make specific gifts to individuals, classes of individuals, and charities.

<b>Recipient</b>	<b>Property</b>
_____	
_____	
_____	
_____	
_____	
_____	
_____	
_____	

**#3: DISTRIBUTION OF REMAINING TRUST ASSETS TO CHARITIES, INDIVIDUALS, OR BOTH**

Individuals (or classes of individuals) only

Charities only

Both individuals and charities (\_\_\_\_\_ Percent or \_\_\_\_\_ Dollars to charities)

**DISTRIBUTIONS TO CHARITY**

An example of a class of individuals is "my grandchildren" and "my nephews and nieces"

Charity Name	Address	Share
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%

**DISTRIBUTION OF REMAINING TRUST ASSETS TO SPOUSE (IF APPLICABLE)**

All to spouse, any disclaimed assets by percentage to one or more beneficiaries named in exhibit 2.

\_\_\_\_\_ Percent to spouse, all remaining and any disclaimed assets by percentage to one or more named individuals or classes of individuals.

The spouse will be listed with other individuals or classes of individuals and the distribution to the spouse will be by percentage along with other beneficiaries.

None of the remainder assets will be distributed to the spouse

**DISTRIBUTION TO INDIVIDUALS OR CLASSES OF INDIVIDUALS**

An example of a class of individuals is "my grandchildren" and "my nephews and nieces"

Recipient/Class	Relationship (if applicable)	Share
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%
_____	_____	%

#### #4: REMOTE CONTINGENT BENEFICIARIES

If #3 fails, as beneficiaries are unable or unwilling to accept your bequest, then you may create a backup plan. The default remote contingent beneficiary plan uses state intestacy law, i.e. assets are distributed to those who would inherit by law without an estate plan. We will discuss other options available to you as well.

**If you would like for your Gun Trust to contain any features over and above those listed above please describe those additional features here:**

#### REQUIRED EXHIBITS & SCHEDULES

The following Schedules are included in your GunDocx™ Trust. Failure to provide a completed Schedule A may cause your trust to be returned by the BATFE as incomplete.

**Schedule A** is a Schedule of the NFA firearms described on the Form 4(s) you receive from your gun dealer that sold you the NFA items. Schedule A is sent along with a copy of your Gun Trust to the ATF for approval. We assist you in completing your Schedule A.

**Schedule B** is a Schedule of Non-NFA Assets you own that you might decide to transfer to your Gun Trust. There is no requirement that you have to transfer non-NFA firearms to your Gun Trust, and Schedule B is never sent to the A

Your trust transfers and conveys \$10 in cash and also other assets to “fund” your trust, making it legally effective on the date signed by you as Trustmaker. An assignment of **non-NFA** firearms and firearms accessories is also provided for your convenience and as additional documentation.

Transfers of **NFA firearms** require a BATFE approved transfer in order to become trust property or to be distributed from the trust to any other person or entity.

#### ASSET PROTECTION PLANNING

In the event you have to use your firearm in self-defense and the perpetrator(s) and either killed or injured you in all likelihood a civil action seeking damages will be filed against separate and apart from any criminal actions. Your investments, non-residential real estate and other assets could be at risk. Would you like to discuss asset protection planning and strategies with us?

Please check one:

\_\_\_\_\_ Yes \_\_\_\_\_ No

# PROSPECTIVE CLIENT DECLARATION

**I/We (if married or cohabitating), \_\_\_\_\_, am/are requesting Garner Law Firm, P.C. to prepare for me a Gun Trust that will own NFA/Class III firearms. I/We attest and confirm the following:**

I/We am/are twenty-one years of age or older or am/are otherwise eligible to receive trust benefits under applicable law and Trustee discretion;

I/We am/are of sound mind;

I/We have not been convicted of a felony or of a misdemeanor crime of domestic violence;

I/We am/are not otherwise prohibited by federal or state law to ship, transport, receive, or possess firearms;

**By my/our signature(s) below, on the date set forth, I/we declare under penalty of perjury under the laws of the state of the State of Texas that the foregoing is true and correct.**

DATED: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

(If necessary)

DATED: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_