

# MILE HIGH GUN LAW GROUP

A DIVISION OF DAVIS SCHILKEN, PC

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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? Underline 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): \_\_\_\_\_

**WARNING! ONLY SIGN THIS GUNLOCKER 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 ONE OF OUR ATTORNEYS.**

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

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

**CHECK ONE:**

**Creation of New Trust**

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

Initial Trustee  
(usually yourself): \_\_\_\_\_

**Restatement of Existing 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 are:

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

**SUCCESSOR TRUSTEE INFORMATION**

**In the event of your death or incapacitation, who would you want to take over managing your GunLocker 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 GunLocker 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 GunLocker 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 GUNLOCKER 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 GUNLOCKER 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.

#### REQUIRED EXHIBITS & SCHEDULES

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

**Schedule A** is a Schedule of National Firearms Act Assets (if any).

**Schedule B** is a Schedule of Non-NFA Assets. This Schedule can be customized for privacy.

Your GunLocker Trust™ transfers and conveys \$10 in cash and also other assets to “fund” your GunLocker 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 GunLocker Trust™ property or to be distributed from the GunLocker Trust™ to any other person or entity.