

# NFA TRUST QUESTIONNAIRE

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**INSTRUCTIONS:** Please complete the following form. **Wherever this form asks for a name, please provide full legal names.** Once you have completed the form, please mail, fax, e-mail, or drop the form by our office. Once Jeff has received your form, your trust will be ready in approximately 12-24 hours.

## CLIENT INFORMATION

Your Full Legal Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_ Zip: \_\_\_\_\_

Telephone: Home ( ) - Work ( ) - Cell ( ) -

E-Mail(s): \_\_\_\_\_

Date of birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Citizenship: \_\_\_\_\_

## TRUST INFORMATION

1. Who would you like to be a joint trustee? (Joint trustees must be 18 years of age and not prohibited from possessing firearms. They must be 21 if you wish them to purchase NFA items from a dealer). **HINT: These are the people who can take the NFA items to the range without you going with them.**

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

2. Who would you like to be a successor trustee? (Successor trustees must be 18 years of age and not prohibited from possessing firearms). **HINT: These are the people who take over ONLY upon your death to carry out your wishes in the distribution of trust assets.**

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\_\_\_\_\_  
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3. Which initial assets you would like transferred into the trust?  
**HINT: Your trust MUST be funded with something to be valid. If you have no NFA items, please select one round of ammo and tell me the caliber.**

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