

## NFA Trust Planning Worksheet

1. **General Instructions.** Your communications with Matthew L. Winton<sup>PLLC</sup> are covered by attorney-client privilege, including the contents of this Worksheet. It is crucial that you identify any person (including yourself) listed on this worksheet who is or may be either 1) a trustee, or 2) a beneficiary of your NFA Trust who is a) a minor, b) under indictment for or convicted of a felony, c) incapacitated, or d) otherwise prohibited from possessing a firearm under the laws of Oklahoma or the United States.
2. **Process for setting up your NFA Trust.** Based on the information you provide on the worksheet, I will draft your NFA Trust and related documents, including a memo on how to register your trust. Below is various information for use on this Worksheet:
  - 2.1. Anyone you want to have access to the NFA item needs to be listed as an Initial Trustee. Keep it to a reasonable number, like no more than 5.
  - 2.2. You are the grantor of the trust and so you cannot be a beneficiary. Initial Trustees other than yourself can also be beneficiaries.
  - 2.3. I do not need the serials, etc of your non-NFA items on the personal firearm record – it is just for you to go through the process of good record keeping, which many forget to do.
  - 2.4. You may email or fax your worksheet back to me at any time. Before I send you drafts of the trust, you will need to deposit the trust fee of \$300 with my office. You may pay by credit/debit card by calling my office or you may pay by check payable to “Matthew L. Winton<sup>PLLC</sup>.”
  - 2.5. Once I have your completed worksheet, I can complete your Trust and have drafts to you within a couple of days. When you are ready to sign, you will contact my office to schedule an appointment. Execution or closing of the Trust at my office will take approximately 30 minutes.
3. **Words you might not be familiar with.** “Trustee” is someone who you want to have present access to a Firearm. “Initial Trustee” is someone you want to have current ability to actually and constructively possess the NFA item. “Successor Trustee” is someone you trust to administer the NFA Trust when the Initial Trustees are dead. It is recommended that you name two Successor Trustees, although if you have a large number of Initial Trustees (four or five) you may leave that section blank if you wish. “Beneficiary” is someone you want to own the Firearm when you are dead. It is required that you name at least one Beneficiary. You may choose Beneficiaries who are also serving as Trustees. Individuals under the age of 21 may not serve as Trustees, but may be designated as Beneficiaries.

### Worksheet Questionnaire

1. Do you own or intend to possess any firearms, machine guns, silencers, or destructive device (collectively, Firearm) governed by the National Firearms Act or applicable Oklahoma law? If “YES,” then complete the remainder of this Worksheet.

2. Are all your Firearms kept within a locked safe? \_\_\_\_\_ YES \_\_\_\_\_ NO
- 2.1. If YES, all persons who have access to the locked safe must be listed as Trustees of the NFA Trust. This would include any person knowing the combination to any lock on the safe. List all such persons and their addresses here: \_\_\_\_\_

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

Your Legal Name: \_\_\_\_\_  
Your Social Security Number: \_\_\_\_\_  
Spouse's Legal Name: \_\_\_\_\_

Choose a Name for your NFA Trust [Can be anything you want, but you might want to keep it short and not get too cute. It is preferable to include "NFA Trust" and to avoid just numbers.]:

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

Residential Address

\_\_\_\_\_  
City County State ZIP

Address where Firearms are located (if different than above)

\_\_\_\_\_  
City County State ZIP

Preferred Email Address Preferred Phone Number

NFA Items you want to transfer into the Trust by Manufacturer, model, and serial number:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

List the names and addresses of the persons you choose as **Initial Trustee** of your trust:

Trustee's Legal Name: \_\_\_\_\_  
\_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP  
Trustee's Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP  
Trustee's Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

Trustee's Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

**Successor Trustees** will serve in the event all Initial Trustees are unable to serve.

First **Successor Trustee's** Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

**Second Successor** Trustee's Legal Name [This person serves if the First Successor Trustee is unable to serve: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

List the names and addresses of the persons you choose as **beneficiaries** of your trust:

Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

Legal Name: \_\_\_\_\_

Residential Address

\_\_\_\_\_  
City County State ZIP

I state on my oath under penalty of perjury under the laws of the State of Oklahoma and the United States that 1) I am familiar with and understand the requirements of the National Firearms Act, and 2) all statements and information above are true and correct to the best of my knowledge.

\_\_\_\_\_  
Printed Name: \_\_\_\_\_

\_\_\_\_\_  
Date