



1. Please look over the PDF copy of your main trust (approx. 20pgs) to make sure all spelling of your name, co-trustee names and beneficiary names are correct.
2. Open the certificate of trust and check for correct names and addresses on this document. (This document is required by the State of Texas to have current addresses on it. You will receive this document in word format so you can make changes easily on your time frame.)

A little about the items you are receiving...

Main Trust (PDF):

- Multi-generation usually run approx. 20 pgs. and depends on how many trustees you start with, the length may vary.
- When you purchase a class 3 item from a dealer (form 4) or when you fill out a form 1, a copy of this must accompany the forms to the ATF.
 - There are a few signature blocks for you to sign, one on page 17, two on page 18, and the very last page which should be your schedule A.
 - *** all signatures that require a notary must be complete before forms can be sent to the ATF.
 - Make sure to rescan in the future as documents are added to the trust.

Certificate of Trust (WORD):

- This document is a short version of your main trust.
- You should carry a copy of this and the tax stamp for the item that you are carrying.
- This is NOT the form that the ATF would like to see when submitting a form 1 or 4.
- You will receive this form in Word so you may make address changes at will.
 - If you are not comfortable changing the address or addresses yourself, you may email us, and we will help you with changes in a few business days.

Assignment of Property Form (WORD):

- This form is used to for addition of other items or personal property.
 - You may use this form to add your NFA items, in addition to other items like regular guns, jewelry, cars, etc...
 - We suggest you not add real property (AKA Real Estate) to this trust. For questions email us.
 - You can make as many cells as you need to add inventory.
- DO NOT send this form to the ATF. The ATF only requires the schedule A, which is the final page to your trust.



Assignment of Co-Trustee (add people) (WORD):

- Use this form to add trustees in the future
- Change John Doe's name to the name of the individual you are adding.
- Make sure to change all areas in yellow to reflect the information required.
 - If you are having this form notarized in another state, make sure the information reflects that.
- Attach the originals to the main trust and make a copy and attach to the certificate of trust.

APPOINTMENT OF CO-TRUSTEE

Settlor Robert Morrow Caruth, pursuant to the terms of Section 4 of Article III of the **JOHN DOE TRUST**, does hereby appoint **JOHN DOE** to serve as Co-Trustee of the **JOHN DOE TRUST**. Such appointment shall commence immediately. Settlor hereby reserves the right to remove such Co-Trustee and to appoint substitutes as provided by the terms of the **JOHN DOE TRUST**.

IN WITNESS WHEREOF, this appointment was executed on this the ____ day of ____, 2014.

John Doe, Settlor

STATE OF **TEXAS**

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COUNTY OF **XXXXXX**

BEFORE ME, the undersigned authority, in and for the State of Texas, on this day personally appeared John Doe, in his capacity as Settlor, known to me to be the person whose name is subscribed to the foregoing document, and acknowledged to me that he executed the same for the purposes and consideration therein expressed and in the capacity therein stated.

GIVEN UNDER MY HAND AND SEAL OF OFFICE on this the ____ day of ____, 2014.

Notary Public, State of Texas

Acknowledgement of Co-Trustee (WORD):

- This form is for trustees to acknowledge their roles as a trustee.
 - They must sign in order to be active.
- Make sure to change all areas in yellow to reflect the information required.
 - If your trustee lives in another state and are signing in their home state, make sure the information reflects that.
- Attach the originals to the main trust and make a copy and attach to the certificate of trust.



ACKNOWLEDGMENT OF CO-TRUSTEE

The following person has been appointed to serve as Co-Trustee of the **DOE TRUST** and they have agreed to serve as Co-Trustee of the Trust and abide by all of the Provisions of the Trust.

NAME: **JOHN H. DOE**

Address: **989 Mystery Lane, CITY, County, STATE, ZIP**

Phone: **(999) 999-9999**

JOHN DOE, Co-Trustee

STATE OF **TEXAS**

COUNTY OF **XXXXX**

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BEFORE ME, the undersigned authority, in and for the State of Texas, on this day personally appeared **JOHN DOE**, in his capacity as Co-Trustee, known to me to be the person whose name is subscribed to the foregoing document, and acknowledged to me that he executed the same for the purposes and consideration therein expressed and in the capacity therein stated.

GIVEN UNDER MY HAND AND SEAL OF OFFICE on this the ____ day of _____, 2014.

Notary Public, State of **Texas**

Some things to remember...

- ❖ **Never** give out your originals. ATF will not return forms. We suggest you carry hard copies or electronic copies.
- ❖ When you have everything notarized, **scan a complete** copy of your main trust and certificate of trust as separate files, so all you ever have to do is print from your electronic copies.
- ❖ **Scan your TAX STAMP** when you receive it back from the ATF.
- ❖ **Keep your originals in a safe place**, and together.
- ❖ Keep a copy of all files on a flash drive for convenience.
- ❖ You **can make a second copy** of your flash drive (because things fail...)