



[KYLE@LAWKPS.COM](mailto:KYLE@LAWKPS.COM) ■ 612-424-0529 ■ [WWW.LAWKPS.COM](http://WWW.LAWKPS.COM) ■ 7600 BOONE AVENUE N, SUITE 15, BROOKLYN PARK MN 55428

## NFA TRUST – GETTING STARTED

I WOULD BE HAPPY TO ASSIST YOU IN GETTING YOUR NFA TRUST SETUP. THE PROCESS CAN BE PERFORMED FOR ANY MINNESOTA RESIDENT OF AT LEAST 21 YEARS OF AGE AND MAY BE PERFORMED WHOLEY VIA EMAIL/MAIL AND TELEPHONE (NO NEED TO TRAVEL TO THE TWIN CITIES IF YOU LIVE ELSEWHERE).

HERE'S HOW THE PROCESS WORKS:

- 1.) REVIEW THE MATERIALS IN THIS PACKET
- 2.) SIGN THE ENGAGEMENT AGREEMENT
- 3.) COMPLETE THE NFA TRUST QUESTIONNAIRE
- 4.) SEND THE FOLLOWING TO ME VIA EMAIL (TO [KYLE@LAWKPS.COM](mailto:KYLE@LAWKPS.COM)) OR VIA U.S MAIL IF YOU PREFER (TO 8100 23<sup>RD</sup> AVENUE N., MINNEAPOLIS MN 55427)
  - a. THE SIGNED ATTORNEY ENGAGEMENT AGREEMENT
  - b. THE COMPLETED NFA QUESTIONNAIRE
  - c. ANY QUESTIONS YOU HAVE
- 5.) I WILL THEN SEND YOU:
  - a. A DRAFT TRUST DOCUMENT AND SCHEDULES FOR FUTURE USE, ALONG WITH INFORMATION ON NEXT STEPS AND THE ATF PROCESS (TYPICALLY WITHIN TWO BUSINESS DAYS)
- 6.) CONTACT ME WITH ANY QUESTIONS OR NEEDED REVISIONS
- 7.) GET THE FINAL NFA TRUST NOTARIZED, MAKING IT EFFECTIVE
- 8.) CONTACT ME WITH QUESTIONS OR NEEDED ASSISTANCE REGARDING THE ATF PROCESS
  - a. I WILL CONSULT WITH YOU REGARDING THE ATF FORM 1 OR 4 PROCESS AND REVIEW YOUR FORMS PRIOR TO SUBMISSION IF YOU'D LIKE
  - b. I WILL CONSULT WITH YOU REGARDING ANY ISSUES OR CONCERNS THAT YOU HAVE REGARDING THE ATF PROCESS

IN THIS PACKET:

ATTORNEY ENGAGEMENT AGREEMENT  
NFA TRUST QUESTIONNAIRE  
NFA TRUST FLYER



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## ATTORNEY ENGAGEMENT AGREEMENT

**BELOW IS AN AGREEMENT FOR MY SERVICES. IF YOU AGREE, PLEASE SIGN THIS FORM & RETURN WITH YOUR QUESTIONNAIRE.**

THANK YOU FOR ENGAGING LAW OFFICE OF KYLE PETERSEN-SCOTT TO ASSIST WITH CREATION OF YOUR LEGAL DOCUMENTS.

I WILL PREPARE THE FOLLOWING DOCUMENTS FOR YOU:

### **ONE NFA / ARMS TRUST**

IN PROVIDING THESE SERVICES I WILL RELY ON THE INFORMATION YOU PROVIDE. YOU SHOULD ENSURE THAT THE INFORMATION IS COMPLETE, ACCURATE AND UP TO DATE. IF ANY OF THE INFORMATION CHANGES DURING THE COURSE OF THIS PROJECT, PLEASE SEND ME THE CURRENT INFORMATION.

**SCOPE OF SERVICES.** IT IS IMPORTANT FOR YOU TO UNDERSTAND THE SCOPE OF MY LEGAL SERVICES. I WILL ADVISE YOU WITH RESPECT TO THE NFA / ARMS TRUST. ONCE NECESSARY DECISIONS HAVE BEEN MADE AND INFORMATION HAS BEEN PROVIDED, I WILL DRAFT YOUR NFA / ARMS TRUST DOCUMENT AND SCHEDULES AND PROVIDE THEM TO YOU VIA EMAIL.

**FEES.** BEFORE STARTING YOUR PROJECT, I WANT TO MAKE SURE YOU UNDERSTAND MY FEES.

**THE FEE WILL BE: \$199 FOR A STANDARD NFA / ARMS TRUST + \$6.50 PER MAILED PACKET**

*(\$199 FEE REDUCED TO \$149 FOR ACTIVE PAID MEMBERS OF MINNESOTA GUN OWNERS CIVIL RIGHTS ALLIANCE, \$149 FOR ACTIVE PAID MEMBERS OF MINNESOTA GUN OWNERS POLITICAL ACTION COMMITTEE AND \$149 FOR ACTIVE PAID THE WELL ARMED WOMAN MINNESOTA SHOOTING CHAPTER MEMBERS).*

**THIS IS A ONE-TIME FIXED FEE (ALSO REFERRED TO AS A "FLAT FEE") BASED UPON MY ASSESSMENT OF THE WORK THAT MAY BE REQUIRED FOR A STANDARD NFA/ARMS TRUST. I WILL SEND YOU AN INVOICE AFTER I PROVIDE YOU WITH YOUR NFA/ARMS TRUST DOCUMENT AND ANSWER YOUR QUESTIONS REGARDING THE TRUST DOCUMENT. I WILL ALSO PROVIDE YOU WITH BLANK SCHEDULES FOR YOUR FUTURE USE. IN ADDITION TO THE ABOVE SERVICES, I AM AVAILABLE TO CONSULT ON THE ATF FORM SUBMISSION PROCESS AT NO ADDITIONAL CHARGE.**

BECAUSE THIS IS A FIXED FEE FOR SPECIFIC SERVICES I HAVE PROMISED TO PERFORM, I WILL CONSIDER THE FEE TO BE MY PROPERTY UPON RECEIPT AND FUNDS WILL NOT BE DEPOSITED INTO A TRUST ACCOUNT.

YOU SHOULD PROMPTLY COMMUNICATE ANY QUESTIONS OR CONCERNS YOU HAVE TO ME, SO THAT WE CAN RESOLVE ANY ISSUES AS SOON AS POSSIBLE. MY COMMITMENT TO YOU IS TO PROVIDE THE HIGHEST QUALITY LEGAL SERVICES I CAN.

I APPRECIATE YOUR BUSINESS.

**TERMINATION.** YOU MAY TERMINATE THIS ENGAGEMENT AT ANY TIME FOR ANY REASON UPON ACTUAL NOTICE TO ME PRIOR TO MY HAVING COMPLETED WORK ON YOUR TRUST DOCUMENT. I MAY TERMINATE THE ENGAGEMENT AT ANY TIME FOR ANY REASON PERMITTED BY THE RULES OF PROFESSIONAL CONDUCT. YOU AND I HAVE SIGNED THIS ENGAGEMENT AGREEMENT AND AGREE TO THE TERMS AND CONDITIONS SET FORTH IN THIS AGREEMENT.

**CLIENT SIGNATURE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**CLIENT PRINTED NAME:** \_\_\_\_\_



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### NFA TRUST QUESTIONNAIRE

**PROPOSED NAME OF THE TRUST** *(Keep it as short as possible since it will need to be engraved on any NFA items you manufacture – e.g. Doe Arms Trust or JMD Trust):*

\_\_\_\_\_ Trust

**YOUR FULL NAME:**

**YOUR ADDRESS:**

**US CITIZEN (CIRCLE):**    Yes    No

**YOUR TELEPHONE:**

**EMAIL ADDRESS:**

**ARE YOU AN ACTIVE PAID MEMBER OF MN GOCRA, MN GUN OWNERS CAUCUS, OR MN TWAW?**

**FULL NAME, ADDRESS, & PHONE NUMBER OF JOINT TRUSTEES** *(Must be 18 years of age & not prohibited from possessing firearms ... 21 if you wish them to purchase NFA items from a dealer.*

*HINT: These individuals will need to submit fingerprints, photos, and Responsible Person form when you submit NFA applications to the ATF. These are the few trusted people who may take action on behalf of the trust, who may take the NFA items to the range without you going with them, and are those trusted individuals who would have access to the safe or location where you will store the NFA items):*

**SUCCESSOR TRUSTEES IN THE ORDER THEY SHOULD SERVE** *(Must be 18 years of age & not prohibited from possessing firearms. HINT: These individuals will need to submit fingerprints, photos, and Responsible Person form when you submit NFA applications to the ATF. The Successor Trustee will take over administration of the trust upon your death to carry out your wishes in distributing the trust assets.)* Include FULL NAME, ADDRESS, & PHONE NUMBERS:

\*\*\* ANYWHERE THAT NAMES ARE PROVIDED, PLEASE INCLUDE THE FULL LEGAL NAME, INCLUDING ANY MIDDLE NAMES.\*\*\*

**INSTRUCTIONS FOR DISTRIBUTION TO BENEFICIARIES (HINT: These are the people who you want to leave your NFA items to upon your death.) Include FULL NAME, ADDRESS, & PHONE NUMBERS OF BENEFICIARIES and provide DATE OF BIRTH for any Beneficiaries who are under age 18. Indicate how to divide the assets (all to one person, or to backup, divide equally, other division):**

**INITIAL ASSETS TO TRANSFER TO TRUST (e.g. one unaltered non-NFA item which you are planning to convert to an SBR, including brand, model, serial #, and caliber. If none, please select one round of ammo and tell me the caliber):**

**DO YOU WISH TO INCLUDE NON-NFA FIREARMS & ACCESSORIES IN YOUR TRUST?**

**If yes, I will provide you with a special schedule that allows you to transfer Non-NFA items into the trust without unnecessarily disclosing information not required by the ATF when submitting NFA Forms.**



LAW OFFICE OF

*Kyle Pettersen-Scott*

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## **\$199 NFA Trusts**

*(\$149 for Active Paid Members of GOCRA, MN Gun Owners Caucus, and TWAW)*

### **What are the benefits of using a trust to buy NFA items?**

There are numerous benefits to using an NFA trust to purchase NFA items instead of acquiring them as an individual.

#### **Expanded Usability of Your NFA Items**

- The creator of a trust may name any number of joint trustees
- Any trustee may make unlimited use of trust assets
- Any trustee may allow shooting acquaintances to shoot trust assets in their presence

#### **Estate Planning Benefits**

- Trust assets avoid probate
- Trust assets pass tax-free on a form 5 to named beneficiaries
- Trust assets may be held for underage beneficiaries
- Successor trustees are given detailed instructions on how to handle NFA items

#### **Asset Protection Benefits**

- Trust assets do not become contraband when trustees become disqualified
- Trustees who become disqualified are automatically removed from the trust
- The trust retains ownership of trust assets for the benefit of beneficiaries