



F.A.Q.

The GunDocx™ Trust and Legacy Planning System

What is the GunDocx Trust System?

The *GunDocx™ Trust and Legacy Planning System* is the nation's only comprehensive approach to firearms legacy planning that is designed to fill a void in the market. The foundational component of the GunDocx System is an automated document drafting application that enables attorneys to prepare gun trusts. A gun trust is a special purpose revocable living trust that is created to hold only firearms. A properly drafted gun trust helps heirs avoid problems relating to state and federal laws, as improper transfer of a regulated firearm can constitute a criminal offense.

Gun trusts are used primarily for two reasons:

1. To legally expedite the transfer of NFA firearms to heirs.
2. To provide specific instructions over disposition of the gun collection.

“In His Own Words” – A Message from WealthCounsel Principal Dennis Brislawn



Dear Colleagues,

The GunDocx™ Trust and Legacy Planning System provides a comprehensive approach to firearms planning. Gun owners are a large segment of the population and are passionate about issues ranging from the Second Amendment to hunting, competitive shooting, collecting, as well as legacy planning.

WealthCounsel recognized that this active and conscientious segment of the population has unique planning needs that are not being addressed. The GunDocx System equips estate planning attorneys to serve and bond with clients through firearms-specific legacy planning. This deeper relationship invariably leads to the opportunity to provide the full range of estate and business planning legal services.

At its heart the GunDocx System is an automated document drafting application that enables attorneys to prepare trusts specifically designed for the use, possession, and transfer of firearms. A “gun trust” is a purpose-built revocable living trust designed to help clients and their loved ones to comply with the unique and complex state and federal regulations governing the ownership and transfer of firearms. Failure to properly plan for the care and transfer of firearms may expose heirs or fiduciaries to federal prosecution. The GunDocx System is your guide to help them understand these legal and planning issues.

WealthCounsel members will recognize that the GunDocx assembly system operates very much like WealthDocx®, as it shares the same platform and programming and editorial styles. The GunDocx™ CLE course provides the depth of legal knowledge required to get the full benefit of the GunDocx™ drafting system.

Sincerely,
Dennis Brislawn
Brislawn Lofton, PLLC

Describe the practice profile of attorneys who would use GunDocx.

The demand for this solution originates from:

- Attorneys from various legal disciplines who are firearms owners/advocates and who possess a “shared interest” within a community of gun enthusiasts.
- Estate planning attorneys who are interested in expanding their client services by developing a niche practice for gun owners and collectors.
- Attorneys practicing in certain geographic regions of the country with strong cultural traditions involving hunting and gun ownership / gun collections.
- Attorneys who view legacy planning for firearms as a “gateway opportunity” to generating other forms of client business more consistent with their core practice.

Tell me more about GunDocx as it relates to niche practices.

WealthCounsel is committed to ensuring that WealthDocx meets the needs of all of our attorney members, including those with niche practices. In this regard, we have identified a unique opportunity to extend the robust capabilities of WealthDocx to help attorneys whose clients are gun collectors or firearms enthusiasts.

- Legacy planning for firearms is an issue that impacts millions of Americans that crosses all boundaries of race, political beliefs, gender, and profession.
- People may collect guns for self-defense, target shooting or hunting. Guns may be investments or heirlooms. Many gun owners want their guns to be used responsibly and be passed on to heirs/beneficiaries who will appreciate them.
- Certain firearms and accessories are restricted by federal, state and local laws, and there are many regulations and issues surrounding the passing down of guns to one’s heirs.
- Trust planning is an ideal solution for gun owners to plan for their families. In addition to the preparation of the proper estate planning documents, attorneys who represent gun-owner clients often need technical education as it relates to the National Firearms Act and BATF.

What is meant by a “comprehensive” approach?

The *GunDocx™ Trust and Legacy Planning System* is more than a GunTrust and includes the following elements which may be purchased separately or as a bundle.

1. Special purpose revocable living trust specific to firearms and accessories
2. Firearms legacy planning CLE course
3. Social media marketing system with technical support (Not yet available. Currently under development.)

By offering a comprehensive, organized approach that includes drafting software, technical education, and a turn-key marketing solution, we can increase the likelihood of success for an attorney to quickly build and execute a specialty practice in firearms legacy planning. Again, all components of the system may be purchased separately or as a bundle.

What are the key drafting elements in GunDocx?

GunDocx is a comprehensive firearms trust drafting system that integrates with the WealthDocx® automated drafting system. Gun trusts, while sometimes confused with conventional living trusts, must be specifically and carefully drafted to avoid causing inadvertent and accidental felonious behavior by Grantors, Trustees, and Beneficiaries of such trusts.

Key drafting elements and options of gun trust planning include provisions for transfers of firearms and the interplay of concurrent state and federal regulation of firearms.

- **BRONZE** – (NFA-only): Designed to acquire NFA-regulated firearms permitted in your state.
- **SILVER** – (All firearms, next generation planning outright or decanting): Offers the best combination of benefits and planning options for most clients. Names contingent beneficiaries, contains detailed guidance, attorney consultation and reference materials.
- **GOLD** – (Collectors, Multi-state and Dynasty Planning): Designed for those with larger collections or complex goals such as multi-state firearms ownership, separate planning for individual beneficiaries, or even multi-generational planning for family benefits.

Describe the continuing education component

The CLE course focuses on relevant federal, state, and local laws. Learning objectives include:

- Why planning for firearms is often overlooked by mainstream estate planning attorneys.
- How to avoid violations of federal and state firearms laws, and what constitutes the definition of “transfer” where firearms are concerned.
- What the differences are between a conventional living trust and a gun trust, and the risks to a client or client’s family of using the former rather than the latter.
- How to explain firearms law, gun trust and firearms legacy planning options to clients
- How to build a niche practice relating to firearms by becoming known as a solutions provider with unique knowledge.
- How to use social media tools to educate potential clients and gun dealers about the merits of legacy planning for firearms.

When are the GunDocx CLE courses offered?

The first live CLE workshop debuted January 26-27, 2012 in Bellevue, WA. Upcoming courses will be posted on the WealthCounsel Education Calendar which will likely be webinar-delivered.

May I purchase the course materials if I cannot attend the workshops or webinars?

Course materials are available for purchase in the WealthCounsel MarketPlace via electronic download. [Click here](#) for more information and to order. Contact marketplace@wealthcounsel.com with questions.

Please describe the “Marketing Component.”

While not yet available for full implementation, the marketing component will consist of a turn-key, subscription-based social media communications system designed to help attorneys build a niche practice by marketing their services to those who are part of the online “communities of interest” serving gun owners. Known as The GunDocx Lawyer Community™, this electronic, Internet-based marketing solution readily connects the attorney to national distribution channels such as the NRA Foundation’s Estate Planning Professionals Network, selected charities and other interest groups, and is most powerful when integrated with WebSource website design, CMS, and hosting. Additional information will be forthcoming when this component is ready for implementation.

What's the cost to purchase GunDocx?

Single Computer License:

Members: \$ 750 (one-time fee to purchase)

Non-Members: \$1,350 (will require the purchase of HotDocs)

Site License:

Members: \$1,250 (one-time fee to purchase)

Non-Members: \$2,450 (will require the purchase of HotDocs)