



STEWART LAW

Gun Trust Consultation Checklist

A practical guide to your goals and questions before a Florida gun trust consultation.

Bring questions, not completed legal forms. This checklist helps you prepare for a conversation with Stewart Law. It is not a trust instrument, an ATF application, or permission to possess or transfer any firearm.

Before you begin

You do not need every answer before meeting with us. Do not write serial numbers, registration details, account numbers, Social Security numbers, or other sensitive identifiers here. Do not send firearm records by ordinary email.

Name: _____ Consultation date: _____

Main questions or concerns: _____

1. Your goals

Start with what you hope to accomplish; you do not need to know the legal solution.

- ☐ Note why you are considering a gun trust and your most important questions.
- ☐ Think about who you hope to protect or plan for over time.
- ☐ Note any upcoming life event or timing concern you want to discuss.
- ☐ Identify what you would like the attorney to explain before you decide anything.

2. People and succession

The attorney can discuss who may lawfully serve and what roles make sense.

- ☐ Think about people you might want involved in future decisions or succession.
- ☐ Note whether any intended person lives outside Florida or may move.
- ☐ Consider family changes, minors, or other circumstances that may affect your plan.
- ☐ Write down concerns about what should happen after incapacity or death.

3. Existing plans and property context

A broad overview is enough for an initial conversation. Keep sensitive records private.

- ☐ Note whether you already have a will, living trust, gun trust, or related estate plan.
- ☐ Note whether you already own or are considering property with special firearm rules.
- ☐ Mention any inheritance, shared ownership, or out-of-state property questions.
- ☐ Bring existing planning documents only if Stewart Law asks you to do so securely.

4. Practical questions for Stewart Law

Use these prompts to guide advice tailored to your circumstances.

- ☐ Ask how current Florida and federal rules may affect your goals.
- ☐ Ask about lawful access, storage, and changes in who may be involved.
- ☐ Ask how travel, relocation, or a move by a family member could affect planning.
- ☐ Ask how a gun trust might work with your broader estate plan.
- ☐ Note any other questions you want answered before making a decision.

Next step: Bring this checklist to your consultation. Stewart Law can assess your circumstances and explain lawful options under current Florida and federal rules. Rules and agency policies can change.

Questions and notes for your consultation

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