**Trust/LLC questionnaire**

For underwriting review

When submitting a piece of business to Private Client Group that involves a Trust or LLC, you will need to answer the following questions. Please submit your completed questionnaire to your underwriter.

1. **What is the name of Trust/LLC?**
2. **What is the intent of the Trust/LLC?**

1. **Does the Trust/LLC operate on a for-profit basis?** **[ ]  Yes** **[ ]  No**
	1. **If yes, how are profits generated?**
	2. **What revenues does the LLC/Trust generate?**
2. **Who owns the Trust/LLC?**
	1. **Is this sole or joint ownership?** **[ ]  Sole** **[ ]  Joint**
3. **Who are the members of the Trust/LLC?**
4. **If a Trust:**
	1. **Who is the trustee?**
	2. **Who are the beneficiaries of the Trust?**
5. **What property/properties does the Trust/LLC own?**
	1. **Are there properties owned in addition to those presented?**
6. **Are there employees of the Trust/LLC?** **[ ]  Yes** **[ ]  No**
	1. **If yes, how many?**
	2. **What are their responsibilities?**
	3. **How are they paid?**
7. **Are there additional insurance policies that name the Trust/LLC as an insured or additional insured?** **[ ]  Yes** **[ ]  No**
	1. **If yes, please list:**
8. **Is the Trust/LLC to be added to the excess liability policy? [ ]  Yes [ ]  No**
	1. **If yes, please list the interest(s) that the Trust/LLC has in the client’s home(s) and/or auto(s):**
9. **If the Trust/LLC is to be the named insured on the policy, should any person be added as an additional insured with worldwide liability? [ ]  Yes [ ]  No**
	1. **If yes, please list:**