**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:**