

Trust/LLC Questionnaire

1. What is the name of the Trust/LLC?
2. What is the intent of the Trust/LLC?
3. Does the Trust/LLC operate on a for-profit basis?
 - a. If yes, how are the profits generated?
 - b. What revenues does the Trust/LLC generate?
4. Who owns the Trust/LLC?
5. Who are the members of the Trust/LLC?
6. If a Trust/LLC:
 - a. Who is the trustee?
 - b. Who are the beneficiaries of the Trust?
7. What property/properties does the Trust/LLC own?
 - a. Are there properties owned in addition to those presented?
8. Are there employees of the Trust/LLC?
 - a. If yes, how many?
 - b. What are their responsibilities?
 - c. How are they paid?
9. Are there additional insurance policies that name the Trust/LLC as an insured or additional insured?
 - a. If yes, please list:
10. Is the Trust/LLC to be added to the excess liability policy?
 - a. If yes, please list the interests that the Trust/LLC has in the client's home(s) and/or auto(s):
11. 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?
 - a. If yes, please list: