

# 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?
3. Does the Trust/LLC operate on a for-profit basis?  Yes  No
  - a. If yes, how are profits generated?
  - b. What revenues does the LLC/Trust generate?
4. Who owns the Trust/LLC?
  - a. Is this sole or joint ownership?  Sole  Joint
5. Who are the members of the Trust/LLC?
6. If a Trust:
  - 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?  Yes  No
  - 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?  Yes  No
  - a. If yes, please list:
10. Is the Trust/LLC to be added to the excess liability policy?  Yes  No
  - a. If yes, please list the interest(s) 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?  Yes  No
  - a. If yes, please list: