

Legal Entity and Trust Questionnaire

1. What is the type of the Legal Entity (Trust, LLC, or LLP)?

2. What is the name of the Legal Entity? If applicable, please provide the Tax ID or FEIN.

3. What is the mailing address for the Legal Entity?

4. Please provide the Principal/Beneficial Owners Name(s)/Members or Agents and their relationship to the insured.

5. What is the intent or purpose?

6. Does the Entity generate income or conduct business with regards to the appreciation of owned property, private residential rental income, management of wealth for the benefit of the principal owners or incidental business? If yes, please provide details.

7. Does the Entity generate income in any other ways? If yes, please list.

8. Does the Entity own any other real estate, vehicles, watercraft, or other tangible assets? If yes, please provide details.

9. Does the Entity have any employees? If yes, please list name and occupation.

10. Does the entity maintain any other insurance policies? Please list the type and carrier.
