

NON-PERSONAL ENTITY QUESTIONNAIRE

Policy Number: _____ Dwelling Location: _____

Please complete this document fully with all Non-Personal Entities (e.g. Trust, LLC, FLP, etc.) that have an ownership interest on any of your property (i.e. residence(s), rental, auto, personal belongings [e.g. jewelry, etc.]).

1.	Name of Non-Personal Entity	
	Address of Non-Personal Entity	☐ Same as Dwelling Location above ☐ Other: _____
	Non-Personal Entity is also owner of other property <i>Note: When an Umbrella policy is present, it is subject to updates based on the provided information.</i>	☐ Auto ☐ Primary Residence ☐ Secondary/Seasonal Residence ☐ Rental Property ☐ Personal Belongings (e.g. jewelry, art, etc.) ☐ Boat/Yacht ☐ Other: _____
	Does this Non-Personal Entity own, operate, or engage in any profit or non-profit commercial/business activity, including but not limited to, obtaining fees/dues?	☐ No ☐ Yes, explain activity: _____ If yes, is activity conducted at Dwelling Location above? ☐ Yes ☐ No
	Grantor(s)/Owner(s)	Reside at Dwelling Location listed above
1.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
2.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
3.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
4.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
	Trustees/Members of this Non-Personal Entity (include name & address)	Relationship to Grantor(s)/Owner(s)
1.		☐ Self ☐ Family ☐ Friend ☐ Attorney ☐ Financial Advisor ☐ Business Partner ☐ Other: _____
2.		☐ Self ☐ Family ☐ Friend ☐ Attorney ☐ Financial Advisor ☐ Business Partner ☐ Other: _____
3.		☐ Self ☐ Family ☐ Friend ☐ Attorney ☐ Financial Advisor ☐ Business Partner ☐ Other: _____
4.		☐ Self ☐ Family ☐ Friend ☐ Attorney ☐ Financial Advisor ☐ Business Partner ☐ Other: _____

2.	Name of Non-Personal Entity	
	Address of Non-Personal Entity	☐ Same as Dwelling Location above ☐ Other: _____
	Non-Personal Entity is also owner of other property <i>Note: When an Umbrella policy is present, it is subject to updates based on the provided information.</i>	☐ Auto ☐ Primary Residence ☐ Secondary/Seasonal Residence ☐ Rental Property ☐ Personal Belongings (e.g. jewelry, art, etc.) ☐ Boat/Yacht ☐ Other: _____
	Does this Non-Personal Entity own, operate, or engage in any profit or non-profit commercial/business activity, including but not limited to, obtaining fees/dues?	☐ No ☐ Yes, explain activity: _____ If yes, is activity conducted at Dwelling Location above? ☐ Yes ☐ No
	Grantor(s)/Owner(s)	Reside at Dwelling Location listed above
1.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
2.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other
3.		☐ Yes ☐ No, reason: ☐ resides elsewhere ☐ rental ☐ deceased ☐ other

