

## **PRIVATE CLIENT GROUP**

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Please answer the following questions in writing for the Trust or LLC.

Name of trust/LLC:

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