

Land Trust & Deed Questionnaire

Client Information

Name: Marital Status:

Address:

Land Trust

Deed

Property Information

Grantor Name:
(current owner of the property)

Grantee Name:

Property Address:

County:

Primary Residence

Mortgage or HELOC

Long term rental

Trust to Purchase Closing Date: _____

Short Term Rental

Subject to Trust Closing Date: _____

IF A DEED - STOP HERE

Trust Information

Name of Trust:

Initial Trustee:

Carter Coons, Esq.

Jointly

Successor Trustee: _____

Consecutively

(Default is for successor trustees to service consecutively if more than one)

Assignee of Beneficial Interest: _____

Wait! Do we have

Emails of all parties?

Certification of Trust (signed)?

Operating Agreements (signed)?

Series Cell agreements (signed)?