

Land Trust Questionnaire

CLIENT INFORMATION

Name: Phone:

Email: U.S. Citizen: Y N

PROPERTY INFORMATION

Please enter the address of the property you wish to transfer to the land trust. If there is no postal address, please enter "Legal Description" in the box and attach a copy of the legal description that was included in the deed. If you need more room please use the **ADDITIONAL INFORMATION** section below.

Property Address:

County: Primary Residence (Y/N): Mortgage or HELOC (Y/N):

Short Term Rental (Y/N): Long Term Rental (Y/N):

GRANTOR INFORMATION

Who is the current owner of the property? (choose one)

Individual(s) Living Trust/Land Trust Business Entity (LLC, partnership, corporation)

Individual(s): If more than two owners, please use the **ADDITIONAL INFORMATION** section below.

Owner 1 Name: Gender:

Address:

Owner 2 Name: Gender:

Address:

Living Trust/Land Trust

Trust Name:

Trustee(s):

Address:

Business Entity

Name: State:

Signor: Title:

Address:

Do you plan on dissolving the entity after the property is transferred to the land trust? **Y** **N**

LAND TRUST INFORMATION

Are you using this land trust to purchase property with cash? **Y** **N**

Trust Name:

The trust name will appear on the deed and public record. We recommend naming your trust after the property. For example, "123 Main Street Trust" or "Main St. Trust." You cannot use the words "Family", "Land", or "Property".

The initial trustee is (choose one): An Individual A Business Entity

Individual

Name: Gender:

Business Entity

Name: State:

Signor: Title:

Please name at least one successor trustee.

Name: Gender: U.S. Citizen: **Y** **N**

Name: Gender: U.S. Citizen: **Y** **N**

If more than one, how will the successor trustees serve? (choose one): Consecutively Jointly

ASSIGNMENT OF BENEFICIAL INTEREST

Are you assigning the beneficial interest of this land trust? (i.e. changing the beneficiary)

To a Business Entity To a living trust No

Business Entity

Name:	<input type="text"/>	State:	<input type="text"/>
Signor:	<input type="text"/>	Title:	<input type="text"/>

Living Trust (please attach the Certification of Trust)

Trust Name:	<input type="text"/>	Date:	<input type="text"/>
Trustee(s):	<input type="text"/>		

DELIVERY OPTIONS

I prefer a digital copy be uploaded to my Box account.

I prefer a hard copy be sent to me at this address:
(Not available for Trusts for Cash Purchase)

ADDITIONAL INFORMATION

Please use this space to add additional grantors, grantees, trustees or any other information needed to prepare the land trust (if any).

DISCLAIMERS

- By clicking this box, you acknowledge that changing ownership of any business entity associated with this property could result in additional property filing requirements and taxes.
- I agree and acknowledge that the above information is true and correct to the best of my knowledge and authorize Anderson Advisors to draft documents and provide services based on this information. I understand that any incorrect information provided by me, or information that changes after this land trust is completed, including but not limited to property information or my personal information, may result in processing delays outside the initially quoted time and may incur a \$250 redraft fee in order to correct.

Name:	<input type="text"/>	Signature:	<input type="text"/>	Date:	<input type="text"/>
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