

# Wyoming Statutory Trust Questionnaire



800.706.4741  
AndersonAdvisors.com

## Client Information

Client Name:

## Trust Name

Provide two names for your trust in the event the first name is already taken with the Secretary of State. The words "statutory trust" will be added to the end of the name provided.

Name:

Name:

## Trust Beneficiary

List the names of the current trust beneficiary(s). This will be the current owner(s) as they appear on the last filed deed.

Name:  Name:

Name:  Name:

## Trustee

This will be an entity formed in Wyoming as either an LLC or Corporation if you want anonymity. Note, the trustee is rarely an individual because a benefit of setting up a Wyoming Statutory Trust is anonymity. If you have not yet created an entity to serve as your Trustee **STOP** and contact your Anderson representative.

Name:

If using an entity as your Trustee, did Anderson create this entity Yes  No

If no, then provide the following:

Entity date of organization:

Entity state of organization:

Entity EIN:

Person(s) authorized to sign on behalf of the entity and their position:

Name:  Position:  Address:

Name:  Position:  Address:

## Trust Manager

The trust manager is the person who will have control over the trust assets in conjunction with the Trustee. There can be more than one trust manager. We recommend you name yourself and whomever else will be dealing with the trust assets.

Name:

Name:

## Trust Purpose

Real Estate  Holding Entity  Non-real estate assets

If non-real estate assets, describe the assets

If setting up your trust for real estate, please answer/provide the following:

Do you currently own the real estate? Yes  No

If Yes, what is the address of the property?

## You Must Provide a Copy of The Last Filed Deed When Returning This Questionnaire

If No, are you setting up the trust for real estate you are under contract to purchase? Yes  No

If Yes, what is the expected close date?

What is the address of the property?

Do you expect to close in this trust or transfer the real estate into the trust after closing?

Close in trust

Transfer to trust after closing

## Assigning Beneficial Ownership

Please identify if the trust beneficiary will assign ownership to an individual or entity other than the current owner on the last filed deed. The trust beneficiary can be one or more individuals, corporation, or living trust. The beneficiary of the trust will be determined based on the trust's purpose and the type of asset being placed in the trust.

If assigned to individual:

Name:  Address:

Name:  Address:

If assigned to a living trust, you must provide a signed certification of trust:

Trust Name and Date:

If assigned to a holding company/other:

Name:

State:  Rep:

Title: