Personal Property Trust Questionnaire

ANDERSON
LEGAL, BUSINESS & TAX ADVISORS

*When a PPT is sold, the below information is needed before the business entity processor can draft the trust.

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Name of Trust: ☐

For brokerage account PPTs, this will typically be part of the LLC name, but ending in "Trust."
Example: ABC, LLC will have a PPT named ABC Trust

State of Trust: ☐

Grantor(s): ☐

Beneficiary(ies): ☐

Are we assigning the original beneficiary's interest to an LLC? *Yes* ☐ *No* ☐

If yes, please list the LLC's name: ☐

Trustee(s): ☐

Will there be a successor trustee? *Yes* ☐ *No* ☐

If yes, please list the name of the successor trustee: ☐

What is the original contribution to the Trust?

$100 Cash *Yes* ☐ *No* ☐
*Most often.

Interest in an LLC (if beneficiary above is the LLC directly). *Yes* ☐ *No* ☐

Will this be for an entity member or for a brokerage account? Entity member ☐ Brokerage account ☐

If this is for an entity member, list the entities this PPT will be a member of:

☐