



Equity Partners Insurance Services
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TRUST QUESTIONNAIRE

Who are the parties to the trust – grantor, trustee, beneficiary?

**Is the trust a ‘personal trust’ exclusively for Estate planning?
(if not, please detail the purpose and any business or commerce engaged in or by the trust)**

Is there any business use on any properties held in the trust?

**Who occupies the property at the risk address?
(If not a party listed in question #1, please give their relationship to the applicant)**

Signature of applicant: _____ Date: _____