
Trustee

NOTICE – This policy excludes all services provided as an attorney.

01. What type of trusts does the **Applicant** provide trustee services for? (Add one or more)

Bankruptcy

Beneficiary

Liquidity

Other

If other, please provide details.

02. Are any of the **Applicant's** trustees, their partners, coworkers, or family members beneficiaries of a managed trust?

Yes

No

03. Is the named **Applicant** provided a trustee or a trust?

Trustee

Trust

04. Does the **Applicant** have discretionary authority over trust funds?

Yes

No

05. Does the **Applicant** use an independent investment counselor?

Yes

No

06. Does the **Applicant** use an independent CPA to prepare trust financial statements?

Yes

No