



Estate/Trust Questionnaire  
S&H Underwriters Inc

Agency:  
Producer:  
Phone Number:  
Email:

Insured Name:

Policy Number:

**PLEASE HAVE ALL QUESTIONS BELOW FULLY COMPLETED AND RETURNED WITH YOUR APPLICATION.**

1) Who is the Trustee? (Full Name Including Middle Initial)

2) Who is the Grantor or Beneficiary for the Trust?(Full Name Including Middle Initial)

3) What is the relationship of the Grantor/Beneficiary to the Trustee listed?

4) Does the Trustee / Grantor / Beneficiary live on premises?

5) If not, who is occupying the structure?

What is their relationship to the Trustee / Grantor / Beneficiary?

6) What is the Date of Birth & Occupation for the Trustee / Grantor / Beneficiary?