

LAND TRUST (LT) OR PERSONAL PROPERTY TRUST (PPT) DATA SHEET

CTS LLC PO Box 65 Glade Hill VA 24092 540 482 0041 email: vactslc@gmail.com

The undersigned makes application Citi Trustee Services LLC (DBA CTS LLC) to set up a ( ) Virginia Land Trust or ( ) Personal Property Trust as follows:

Name of Trust \_\_\_\_\_ Creation date \_\_\_\_\_

Trust Grantor/Creator \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Name of Trustee Citi Trustee Services LLC PO Box 65 Glade Hill VA 24092

Successor Trustee \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Primary Beneficiary \_\_\_\_\_ Percent Interest \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Successor Beneficiary \_\_\_\_\_ Percent Interest \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Street address LT property \_\_\_\_\_

Legal description (attach copy of deed) \_\_\_\_\_

Tax parcel # \_\_\_\_\_ County \_\_\_\_\_

Address you want us to use \_\_\_\_\_

FedEx or UPS account number \_\_\_\_\_

Name and address for overnight delivery \_\_\_\_\_

I/we certify that the above information is true, that the LT is not being set up for any illegal or criminal purpose, and that I am/we are U. S. residents for tax purposes, and I/we agree indemnify the Trustee for any liability with regard to this Trust.

I ACKNOWLEDGE NOTICE THAT CITI TRUSTEE SERVICES, LLC OR ITS MANAGER(S) IS/ARE NOT A LEGAL FIRM , ATTORNEY, TAX ADVISOR, BOOKKEEPER OR CERTIFIED PUBLIC ACCOUNTANT, IF TAX OR LEGAL ADVICE AND/OR OTHER EXPERT ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE RETAINED.

\_\_\_\_\_  
Grantor/Creator

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Name of Trustee Citi Trustee Services LLC PO Box 65 Glade Hill VA 24092

Successor Trustee \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Primary Beneficiary \_\_\_\_\_ Percent Interest \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Successor Beneficiary \_\_\_\_\_ Percent Interest \_\_\_\_\_

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\_\_\_\_\_  
Grantor/Creator

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