



HERITAGE AMERICA
Membership Service Request
CHARITABLE TRUST
TWO CLASS LIMITED LIABILITY COMPANY

Member Name _____ Age _____ Date of Birth ____-____-19____
SS # ____-____-____ Address _____
City _____ State _____ Zip _____ Ph (____) ____-____
Spouse _____ SS # ____-____-____ Age _____ County _____
Date of Birth ____-____-19____ Representative: _____ Rep. Phone (____) ____-____
Amount Paid with Data Form \$ _____ Check # _____ Date _____

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CHARITABLE TRUST INFORMATION

Name of Charitable Trust _____
Donor 1 Name _____
Donor 2 Name _____
Donor 1 Address, City, St, ZIP _____

Donor 2 Address, City, St, ZIP _____

Trustee 1 Name _____
Trustee 2 Name _____
Trustee 1 Address, City, St, ZIP _____

Trustee 2 Address, City, St, ZIP _____

State of Formation _____



HERITAGE AMERICA
Membership Service Request
CHARITABLE TRUST & LIMITED LIABILITY COMPANY

LIMITED LIABILITY COMPANY INFORMATION

Name of LLC: (Client Name(s)) Enterprises, LLC
STATE OF FORMATION
TYPE OF BUSINESS (PURPOSE)
ACTUAL STREET ADDRESS
CITY STATE ZIP COUNTY
PHONE FAX
MAILING ADDRESS

NAME OF REGISTERED AGENT
ADDRESS OF REGISTERED AGENT
CITY STATE ZIP COUNTY

COMMON MEMBERS - MUST NAME TWO: (INTERESTS MUST TOTAL 3%)

Common Members CAN NOT be the Client, or their spouse, or their children, grandchildren, or great grandchildren, or the spouses of their children, grandchildren or great grandchildren.

MEMBER #1 ADDRESS
CITY STATE ZIP COUNTY
#1's PERCENT INTEREST IN LLC % DOLLAR VALUE OF CONTRIBUTION \$

MEMBER #2 ADDRESS
CITY STATE ZIP COUNTY
#2's PERCENT INTEREST IN LLC % DOLLAR VALUE OF CONTRIBUTION \$

PREFERRED MEMBER: (INTERESTS MUST TOTAL 97%)

Client and spouse may own up to 35% of the Preferred Interest, the balance of the Preferred Interest may be owned by the client's Charitable Trust.

MEMBER #1 ADDRESS
CITY STATE ZIP COUNTY
#1's PERCENT INTEREST IN LLC % DOLLAR VALUE OF CONTRIBUTION \$

MEMBER #2 ADDRESS
CITY STATE ZIP COUNTY
#1's PERCENT INTEREST IN LLC % DOLLAR VALUE OF CONTRIBUTION \$

MEMBER #3 ADDRESS
CITY STATE ZIP COUNTY
#2's PERCENT INTEREST IN LLC % DOLLAR VALUE OF CONTRIBUTION \$

MANAGERS: Client and spouse may serve as Managers

MANAGER #1 ADDRESS
CITY STATE ZIP COUNTY

MANAGER #2 ADDRESS
CITY STATE ZIP COUNTY

