



Client Services | 888.990.7892
 E. info@ptcemail.com
 F. 702.946.0136
 W. www.preferredtrustcompany.com
 6700 Via Austi Parkway, Suite 301
 Las Vegas, NV 89119

SECTION 1 | Resource Company Information

Company Name

Street Address City State Zip Code

Company Website Company Contact Person

Contact Person Email Contact Person Phone Number

SECTION 2 | Resource Information Type

Select the category that describe the Company from the following options: Association Product Resource Alternative Investment

Brief Description of the Company (120 words or less)

SECTION 3 | Due Diligence Questions

The answers to the questions below will be verified by a Preferred Trust Company representative during our due diligence process and before inclusion on our company website is granted.

What state is the Company Incorporated (if varies from address above)

Is the Company in "Good Standing" with Secretary of State? Yes No

Is the Company an Accredited Member of the Better Business Bureau (BBB)? Yes No

Is the Company required to maintain a regulatory license(s) to conduct business? Yes No

If yes, who is the regulatory agency(s)? (if applicable)

SECTION 3 | Getting to Know You

What is the **#1** reason you are requesting to be added as a Resource?

What is the **#2** reason you are requesting to be added as a Resource?

What is the **#3** reason you are requesting to be added as a Resource?