



TAX PREPARATION/BOOKKEEPING SERVICES

SUPPLEMENTAL APPLICATION

Applicant:

1. Does the applicant employ or use Certified Public Accountants in the performance of services for clients? YES NO

If YES, please provide details:

2. Does the applicant provide legal advice, render opinions or otherwise interpret tax laws or rulings or accounting rules, standards or principles? YES NO

If YES, attach a description of such activity.

3. Does the applicant supervise or manage any investment or trust funds on behalf of clients? YES NO

If YES, attach a description of such activity.

4. Attach a description of the training period provided or required of employees.

5. Indicate the percentage of estimated gross receipts derived from each of the following:

a. Tax Returns – Individuals %

b. Tax Returns – Businesses %

c. Bookkeeping – Individuals %

d. Bookkeeping – Businesses %

6. Does the applicant perform audits/reviews of compilations of business tax returns? YES NO

It is understood and agreed that this supplemental application shall become a part of the application for Professional Liability Errors and Omissions Insurance.

Name of applicant:

Signature of person authorized to execute on behalf of the applicant:

Date:

A copy of this application should be retained for your records.



COVERAGE OPTIONS

The following coverage options may be available.

Each option must be approved by an underwriter prior to adding.

No prior acts would apply to any coverage enhancement.

Please have the insured check the desired option.

These options apply specifically for this class of business.

ENHANCEMENTS, WITH APPLICABLE ADDITIONAL PREMIUMS:

1. 25% - Full prior acts coverage. Please provide the date their operations began:
2. 25% - Copyright/trademark coverage (subject to a \$500,000 sub limit)
3. 20% - Coverage for defense costs outside of limits
This would be limited to the aggregate limit on the policy
Maximum available is \$5,000,000
4. 15% - First-dollar defense coverage

REDUCTIONS OF COVERAGE, WITH APPLICABLE RETURN PREMIUMS*:

5. 10% - To delete coverage for independent contractors
6. 10% - To delete coverage for personal injury
7. 10% - To delete third-party discrimination coverage
8. 10% - To delete coverage for punitive damages

* A maximum return premium of 30% is available regardless of the amount of options chosen.