

Accountants Professional Liability Insurance

For a preliminary premium estimate, please complete the following information and fax it to 908-782-2054 Raritan Valley Insurance Services (ATTN: Tom Fisher). The premium indicated will be an estimate on and is not binding until and underwriter has reviewed a completed application and offers coverage.

Firm Information

Firm Name: _____ Contact Name: _____
 Firm Address: _____ City: _____
 County: _____ State: _____ Zip: _____ Telephone Number: _____
 Fax Number: _____ E-mail: _____ Website: _____
 Currently Insured? Yes No Carrier: _____ Premium: \$ _____
 Prior Acts Date: ___/___/___ Firm Established: ___/___/___ Expiration Date: ___/___/___
 Limit of Liability: \$ _____ Deductible: _____
 Annual Gross Revenue: Last: \$ _____ Current (est.): \$ _____ Next(projected): \$ _____
 Percentage of Revenue from the Firm's largest client: _____ %

Staff Count

Total Number of Owners/Partners		Number of Non-Owner CPAs		Number of Non-CPA professional Employees		Number of Non-Professional Employees
CPA	Non-CPA	Full Time	Part Time	Full Time	Part Time	

Estimated Revenue Percentages Derived From Services Offered

Tax Preparation/Planning	%
Audit (Indicate Number of SEC Regulated Clients: _____)	%
Review and Compilation	%
Bookkeeping/Write Up	%
Consulting (Please circle the areas of services): Management Advisory, Litigation Support, Business Investment, Computer Related Services, Projections/Forecasts	%
Special Services (Please Circle the areas of service): ERISA, Fiduciary, Executor/Trustee, Financial Planning, SEC, Personal Business Management, Assurance Services	%
Other (describe briefly)	%
Total	100 %

Number of Claims—open or closed within the past 3 years _____.

Coverage Limit and Deductible

Check the appropriate box below for limits (higher limits may be available):

\$100,000 \$250,000 \$500,000 \$1,000,000 Other: \$ _____

Check the appropriate box below for deductible (higher or lower deductibles may be available)

\$1,000 \$2,500 \$5,000 \$10,000 Other: \$ _____

For guidance in filling out this form, or for a complete application, call 908-237-1800 x225 to speak with Tom Fisher.

Comments: _____



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