

Lawyers Professional Liability EZ Application

Contact Information/Current Policy Info.								
Applicant Name								
Contact Name					Business Phone		()	
Current Policy Carrier		Exp. Date		Current/req. Limit		Prior Acts Excl. Date (if appl.)		
					Current/req. Deductible			
Business Address								
Street			City					
State		Zip	County					
Do you have additional offices/locations? <i>(please provide additional location details in separate attachment, if applicable)</i>							Yes	No
Information Regarding Your History/Areas of Practice								
Date present firm established				Total Number of Lawyers				
Are there any predecessor firms of the applicant?							Yes	No
Do you practice in any of the following areas: Securities, Copyright/Patent/Trademark, Oil/Gas/Mining, Real Estate Development/Syndication, Investment Counseling/Money Management, Entertainment, Sports or Celebrity, Medical Malpractice, Mold, Class Action – Defense or Plaintiff							Yes	No
Does more than 5% of your practice include work in Banking or Financial Institution Services (loan documentation, bonds, commercial paper) OR Mergers/Acquisitions?							Yes	No
Areas of Practice – All areas must total 100% - Please enter percentages and totals below								
Group I	%	Group II	%	Group III	%			
<ul style="list-style-type: none"> • Administrative • Bankruptcy • Commercial & Corporate General Litigation – Defense • Corporate Formation/Alteration, Criminal • ERISA or Employee Benefits, Family Law – excluding Divorce • Immigration • Labor Management Representation • Mediation/Arbitration • Personal or Bodily Injury – Defense • Taxation – Individual • Worker’s Comp. – Defense • Other Defense Work - 		<ul style="list-style-type: none"> • Admiralty/Maritime • Banking or Financial Institutions Services – other than loan documentation • Commercial & Corporate General Litigation – Plaintiff • Environmental • Family Law – Divorce • Labor Union Representation/Emp. Relations • Real Estate – Commercial • Real Estate – Residential • Personal Injury – Plaintiff • Real Estate – Title, Taxation – Commercial • Wills/Estate/Probate/Trust • Worker’s Comp. – Plaintiff • Other Plaintiff Work - 		<ul style="list-style-type: none"> • Banking or Financial Institutions Services – loan documentation, Bonds, Commercial Paper • Collections • Securities, both exempt and non- exempt • Entertainment, Sports or Celebrity • Investment Counseling/Money Management • Mergers/Acquisitions • Oil, Gas or Mining • Patent, Copyright or Trademark • Real Estate Syndication/Limited Partnerships • Civil Rights – Plaintiff • Class Action – Defense • Class Action – Plaintiff • Medical Malpractice • Mold 				
SUB TOTAL A		SUB TOTAL B		SUB TOTAL C				
SUB TOTAL A + SUB TOTAL B + SUBTOTAL C MUST EQUAL 100%								
In the past 5 years, has any professional liability claim or suit ever been made against any lawyer or against the applicant law firm, any prior firm, or any lawyer while practicing at the applicant law firm or any prior firm, whether or not the lawyer is still employed?							Yes	No
Has any incident or circumstance (open or closed) been reported to any malpractice carrier in the last 5 years or is there knowledge of any potential incidents/claims/circumstances?							Yes	No

6610 Sierra College Blvd., Rocklin, CA 95677

916-772-9200 phone * 916-772-9292 fax * CDI License#: OD10271 7-18-08 ed.