

# Quick Quote AOP Supplement

Plaintiff -- Real Estate -- Bankruptcy -- Collections -- Estate / Trust

## I. INSTRUCTIONS

- Complete only the AOP Sections of this Application that apply. For all others select N/A.
- Use this Application for the following areas of practice ("AOP"): Creditors Rights (Bankruptcy and/or Collections), Estate Trust, Plaintiff Litigation and Real Estate
- Whenever used in this Application, the term "you", "your(s)", "firm" or "Applicant" shall mean the **Named Insured** and all subsidiaries or other organizations applying for coverage, unless otherwise stated.

## II. GENERAL INFORMATION

1. Name of Applicant: \_\_\_\_\_

## III. CREDITORS RIGHTS (BANKRUPTCY AND/OR COLLECTIONS) PRACTICE

2. Please provide the following information regarding lawyers providing legal services in the Bankruptcy & Collections area of practice in the past five years (use additional sheets if necessary):  NA

Lawyer Name	Years of Collections Experience	Years of Bankruptcy Experience	Hours of CLE in this Area From Most Recent 12 Months	
			Collections	Bankruptcy

### 3. BANKRUPTCY

NA

Have you or any of your attorneys ever represented debtors in bankruptcy proceeding where total debt exceeded \$10M?

Yes  No

If "Yes" please describe: \_\_\_\_\_

### 4. COLLECTIONS

NA

Please advise if any of the following apply with regard to your Collections practice:

a. Do you provide any services to purchasers of debt or debt consolidators?  Yes  No

b. Do you have written procedures to verify compliance with the FDCPA and all amendments?  Yes  No

c. Do you have written procedures to verify the validity of an alleged debt?  Yes  No

d. Do you accept collection cases in states outside of your office location(s)?  Yes  No

e. Have all collection letters and correspondence been reviewed and standardized to assure compliance with all state and federal statutes?  Yes  No

f. Do you use a formal script that is fully compliant with all state and federal collection laws when contacting debtors by phone?  Yes  No

g. Please estimate the total number of collection matters handled by the firm in the last 12 months: \_\_\_\_\_

h. Please estimate the average debt amount of an individual collection account handled by the firm in the last 12 months: \$ \_\_\_\_\_

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- i. Do you permit outside collection firms to use their name or the name of any of their attorneys in collection activities?  Yes  No
- j. Do you or any of your attorneys have any kind of ownership interest in an outside collection agency?  Yes  No
- k. Within the past five years, have you or any of your attorneys executed any hold harmless or indemnity agreement in favor of any collection clients regarding their own violation or alleged violation of collection laws?  Yes  No

## IV. ESTATE TRUST PRACTICE

- 1. How many lawyers at the firm perform Estate Trust work? \_\_\_\_\_ or  NA
- 2. Do you allow involved lawyers to accept gifts or bequests from Estates and Trusts clients?  Yes  No
- 3. Do services for your Estates and Trusts clients include investment decisions resulting in the purchase or sale of Securities and/or Other Investments? *If "Yes" please explain:*  Yes  No  
\_\_\_\_\_
- 4. Is any member of the firm a Financial Advisor or Registered Representative?  Yes  No
- 5. Do you receive any kind of compensation from the purchase or sale of investment to or on behalf of any Estate or Trust?  Yes  No
- 6. How often do you require an independent audit or reconciliation of active Estates or Trusts? *If "Never" please explain:*  Quarterly  
 Annually  
 Never  
\_\_\_\_\_
- 7. Please complete the following chart estimating the percentage of your Estates and Trusts work according to your client's total asset size:

Clients Total Assets	Estimated Percentage of Estates and Trusts Work
Between \$1,000,000 and \$5,000,000	%
Between \$5,000,000 and \$10,000,000	%
More than \$10,000,000*	%

\*Please provide the value(s) of all work greater than \$10,000,000 \_\_\_\_\_

## V. PLAINTIFF LITIGATION PRACTICE

- 1. How many lawyers at the firm perform Plaintiff Litigation work? \_\_\_\_\_ or  NA
- 2. Total number of Plaintiff Personal Injury cases during the past twelve months: \_\_\_\_\_
- 3. Percentage of cases settled before trial: \_\_\_\_\_ %
- 4. Does the firm use written referral agreements 100% of the time when cases are referred in or out of the firm? *If "No" what documentation is used?:* \_\_\_\_\_  Yes  No  
\_\_\_\_\_

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5. Types of cases:

Category	Percentage of Cases in Each Category	Average Value per Case	Highest Value of Case in Past Five Years	Years of Experience	Number of CLE Hours in the Last Year
Asbestos	%	\$	\$		
Automobile Liability	%	\$	\$		
Aviation	%	\$	\$		
Class Action / Mass Tort	%	\$	\$		
Legal Malpractice	%	\$	\$		
Medical Malpractice	%	\$	\$		
Non-Medical Professional Malpractice	%	\$	\$		
Personal Injury / BI / PD	%	\$	\$		
Pharmaceutical or Medical Device	%	\$	\$		
Product Liability	%	\$	\$		
Slip and Fall	%	\$	\$		
Tobacco	%	\$	\$		
Toxic Tort	%	\$	\$		
Workers Compensation	%	\$	\$		
Wrongful Death	%	\$	\$		
Other:	%	\$	\$		

## VI. REAL ESTATE PRACTICE

1. How many lawyers at the firm perform Real Estate work? \_\_\_\_\_ or  NA
2. What percentage of the firm's Real Estate practice comes from each of the areas? (Must total 100%)

Real Estate Practice Areas	Current Year	Previous Year
a. Residential Title searches, rendering of title opinions and other title work		
b. Commercial Title searches, rendering of title opinions and other title work		
c. Residential Closings – representation of borrowers		
d. Residential Closings – representation of lenders		
e. Residential Closings – representation of sellers		
f. Commercial Closings – representation of borrowers		
g. Commercial Closings – representation of lenders		
h. Commercial Closings – representation of sellers		
i. Residential Land Use, Zoning		
j. Commercial Land Use, Zoning		
k. Eminent Domain		
l. Landlord / Tenant		
m. Construction Work and Mechanics' Liens		
n. Condominiums, Cooperatives, and Town Houses (including conversion)		
o. Foreclosure Work		
p. Other (please describe): _____		
q. Speculative Real Estate		

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3. During the past twelve months, what percentage of transactions did the firm handle that can be classified as Residential Real Estate and/or Commercial Real Estate and what was the average size/value of the transactions or properties:

a. Residential Real Estate: \_\_\_\_\_ %      \$ \_\_\_\_\_

b. Commercial Real Estate: \_\_\_\_\_ %      \$ \_\_\_\_\_

4. How many of the commercial real estate transactions the firm performed are characterized as relating to syndications, limited partnerships or real estate trusts? \_\_\_\_\_

5. With regard to the firm's real estate clients, does the firm or any member of the firm:

a. Have a business relationship with the client other than the rendering of legal services?  Yes  No

b. Accept a percentage of the dollar value of a transaction in lieu of legal fees?  Yes  No

*If "Yes", to any of the questions above please explain:*

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Additional Information / Explanation: