

Lawyers Professional Liability Quote Indication Form

First Choice Insurance Services

Phone: (509) 638-2558 ♦ E-Mail: shannon@fcins.biz

The First Choice To Insure Your Law Firm

Applicant Firm

Contact

Address

City

State

Phone

Fax

County

Date Firm Established

If there is a predecessor firm of which you retained the majority of assets & liabilities, please list the name(s) and dates in existence

Presently have insurance? Yes No Carrier =

Expires:

Do you have a retroactive date / prior acts exclusion date for the firm? If yes, list. If no, put n/a:

First date of continuous claims-made coverage:

Expiring premium (if known):

Current Liability Limits:

Current Deductible:

If you want different limits or deductible, please list:

Do you presently have an Aggregate Deductible?

A loss only deductible? Defense expenses in addition to the liability limits (non-eroding policy)?

| Attorney Name (including solos) (list add'l attorneys by attachment) | # yrs in private practice | Retroactive Date / Prior Acts Exclusion Date | Date Of Hire | Avg. # of Hours / Week |
|---|------------------------------|---|-----------------|---------------------------|
|---|------------------------------|---|-----------------|---------------------------|

Have any claims/suits been made against the firm (or any lawyer in the firm) in the past 5 years? Yes No

Are there any known incidents or circumstances that might result in a claim? Yes No

Has any current or former member of the firm been refused admission to practice, disbarred, suspended, reprimanded, fined or held in contempt? Yes No

Has any member of the firm been the subject of a disciplinary inquiry (even if dismissed)? Yes No

Has the firm or any predecessor firm listed above, or any lawyer proposed for coverage, had lawyer's professional liability insurance declined, canceled or refused renewal? Yes No

Details for any "yes" answer:

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Is this a full time practice of law? Yes No Average number of hours / week in practice:

Why only part time? (partial retirement, stay-at-home parent, etc.)

Number of suits filed against clients to collect fees in the past 2 years: # part time staff

Steps taken to prevent future fee suits? # full time staff

Do you share office space with other lawyers? No Yes Do they carry their own insurance? No Yes

Do you utilize engagement (fee agreement) & non-engagement (closing) letters on a regular basis? No Yes

Do you utilize a planned docketing/calendaring system with at least 2 independent controls? No Yes

Is your docketing/calendaring system computerized? No Yes

Do 2 separate people input dates into 2 separate calendaring systems for the same matter? No Yes

Do you utilize a conflict of interest system? No Yes

Types: computer memory index cards client lists other

Do you have any ongoing client that represents 10% or more of the firm's gross revenue? No Yes

If yes, explain:

Does any attorney have ownership/equity interest in or act as director/officer/etc. of any client? No Yes

Does any of your practice involve class action or mass tort work? No Yes - describe including the types

of cases handled (wage & hour, medical, etc.), whether acting as plaintiff or defense counsel, & whether representing just an individual as part of a class or representing the class itself:

Estimated Annual Gross Income (not including client recoveries):

**Indicate the Percent of Time derived from the following areas of practice in the past year (100%)
(If your practice is just getting started, indicate the estimated percentages):**

Admiralty - plaintiff

Admiralty – defense

Antitrust / Trade Regulation

Appellate (Plaintiff or Defense ?)

Banking / Financial Institutions

Bankruptcy

Business / Commercial Law

Civil Rights / Discrimination

Collection

Commercial Litigation – plaintiff

Commercial Litigation – defense

Communication (FCC) / Media

Construction (describe)

Copyright / Trademark (describe)

Patent (must describe)

Corporate Formation

Corp. Mergers & Acquisitions

Corporation General (describe)

Criminal

Elder Law

Divorce

Domestic / Family (non divorce)

Entertainment / Sports (describe)

Environmental (describe)

Estate Planning

Probate

Wills / Trusts

ERISA / Employee Benefits

Financial Plan. / Invest. Advice

Foreclosure / Repossession

Foreign / International

Healthcare

Immigration

Insurance Company. Defense

Labor Management

Labor – Union / Employees

Mediation / Arbitration

Municipal (no bonds)

Bonds

Public Utilities

Personal Injury - plaintiff

Medical Malpractice

Personal Injury – defense

Real Estate – commercial

Real Estate – residential

School Law

Securities (describe)

Social Security

Taxation – Corporate

Taxation – Individual

Water Rights

Workers Comp – plaintiff

Workers Comp – defense

Other (describe)