

Straits E&O Application

Name of Applicant: _____ Date applicant firm was established: ____/____/____

Mailing address: _____

Phone#: _____ E-mail: _____

Legal Entity: Individual Partnership Corporation LLC Other _____

Describe in detail the services for which coverage is desired:

Service Offered: _____ Percent of total: _____

Service Offered: _____ Percent of total: _____

Service Offered: _____ Percent of total: _____

Revenue:

Total Expected Revenue for the upcoming policy period: \$ _____

Current Year: \$ _____ Last Year: \$ _____ Prior Year: \$ _____

Does the applicant firm utilize the services of Independent Contractors? Yes No

Staff Information (Please include with application all **Principal** and **Key Employee** resumes)

Name: _____ Professional Qualifications: _____ Years Experienced: _____

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Applicant's Staff: # of Full Time _____ # of Part Time _____

Please list professional associations to which the Applicant belongs: _____

Please list the Applicant's **three** largest jobs or projects during the past three years

Name: _____ Services Performed for Client: _____ % Of Gross Revenue: _____

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Name: _____ Services Performed for Client: _____ % Of Gross Revenue: _____

Insurance History (Please list the Applicant's Professional Liability Insurance Coverage carried during the past **three** years, including any periods without coverage)

Name of Insurer: _____ Policy Period: From ____/____/____ To ____/____/____ Deductible: _____

Claim History: Have any claims for past five years? Yes No

Limits of Liability: \$ _____ / \$ _____ Deductible: \$ _____ Effective Date: _____

Does the Applicant sell real estate? Yes No

Please check below if the Applicant or the Applicant's predecessor firm, at any time in the past or present, engaged in any business venture outside the scope of a Property Manager, including but not limited to:

Mortgage Broker Yes No Real Estate Consulting Yes No

Real Estate Appraisals Yes No Property Management Yes No

Insurance Agent, Insurance Broker or Insurance Salesperson Yes No

Please provide a breakout of properties managed by the Applicant (must total 100%)

Residential: _____ % Commercial/ Office: _____ % Retail: _____ % Industrial: _____ %

Other: _____ % Explain: _____