



AFFINITY

Lawyers' Professional Liability Program Indication Request Form

This form is for a non-binding indication based upon this preliminary information. It is not intended to be a binding quote for the firm's acceptance of insurance coverage. To determine the firm's qualification for a binding quote, we will need a fully completed, signed and dated application with any supplemental information.

Contact Information

Firm: _____ Est Date: _____ Street Address: _____
 City: _____ State: _____ Zip: _____ County: _____ Phone: _____
 Fax: _____ Email: _____ Website: _____

Insurance History

Current Carrier: _____ Expiration Date: ____/____/____ Limits: ____/____/____
 Deductible: _____ Retroactive Date: ____/____/____ Annual Premium: _____

Attorney Information

Name of Attorney	Date of Hire	Bar Admission Date	Position	Avg. Weekly Hours
1.				
2.				
3.				
4.				

* Please list additional attorneys on a separate sheet of paper*

Area of Practice Information

Administrative Law	%	Financial Institution	%	Natural Resources	%
Admiralty Law	%	Financial Planning	%	Pension and Employee Benefits	%
Antitrust/Trade	%	Government Contracts/Relations	%	Pers. Injury and Neg. - Def.	%
Civil Rights/Discrimination	%	Healthcare	%	Pers. Injury and Neg. - Pltf.	%
Collection/Bankruptcy	%	Immigration and Naturalization	%	Plaintiff Class Action	%
Construction Law	%	Insurance	%	Plaintiff Mass Tort	%
Consumer Law	%	IP - Patent/Trademark	%	Real Estate/Title Agent - Res.	%
Corp. & Business Transactions	%	IP - Copyright	%	Real Estate/Title Agent - Com.	%
Criminal	%	International Law	%	Securities Law	%
Employment Law - Defense	%	Labor - Mgmt. Representation	%	Taxation - Opinions	%
Employment Law - Plaintiff	%	Labor - Labor Representation	%	Taxation - Other	%
Entertainment/Sports	%	Com. and Business Lit. - Def.	%	Work Comp. - Def.	%
Environmental Law	%	Com. and Business Lit. - Pltf.	%	Work Comp. - Pltf.	%
Estate/Probate/Trust	%	Mediation Arbitration	%	Other	%
Family Law	%	Mergers & Acquisitions	%	Total (must equal 100%)	

Operations Information

1. What were the firms revenues this past year?: _____
2. Do you have a docket system with at least two independent date controls? Yes No
3. Is one of the docket systems computerized? Yes No
4. Does your firm use the following letters for all clients?:
 Engagement Letters Non-engagement letters Disengagement Letters Changes in scope of engagement
5. Which of the following conflict avoidance systems do you maintain? Check all that apply:
 None Computer Index File Conflict Committee Memory
6. Have there been any Professional Liability claims reported against the firm or any past or present attorneys in the past five years or are you aware of any circumstances that may give rise to a claim? If yes please provide details: Yes No
7. Has any action been taken against any lawyer in the firm for disbarment, suspension, reprimand, or other disciplinary action in the past five years or is any grievance complaint pending? If yes please provide details: Yes No
8. Are there any wholly owned entities you would like us to consider for coverage?
 None Mediation/Arbitration Title Agency Other, please specify: _____
9. A. Are you a solo practitioner who only works part time (less than 25 hours/week) at applicant law firm? Yes No
 B. What is the average weekly number of hours spent in primary employment? (If applicant works full time for another law firm, please provide details on a separate page.)
10. Does any client or group of clients make up 10% or more of the firms gross receipts? Yes No (If yes please complete Outside Interest Supplement.)
11. Has any member of the firm been involved in class action or mass tort litigation? Yes No

Return to:

Completed by (print):

Return fax:

Signature:



USI Affinity Where Lawyers Go For Protection

USI Affinity is proud to announce an addition to the comprehensive policy currently available. USI Affinity and the D.C. Bar will now offer D.C. metro area attorneys and law firms a NEW coverage enhancement available only through the D.C. Bar Lawyers Professional Liability Insurance Program:

- **Fee Suit Avoidance*** – Have you tried suing a former client for unpaid fees – only to be counter sued for malpractice? USI Affinity understands that this practice has become more commonplace in today's market and we understand the challenges that attorneys face with this concern. To provide attorneys and law firms with another option in this situation, USI Affinity has negotiated a new policy feature that will reimburse up to \$10,000, per policy, for an attorney or law firm to recover an outstanding fee from a client.

Additional Highlights of the Program's Lawyers' Professional Liability Program:

- **Settlement Control** – We give you the ability to determine when you should settle.
- **Loss of Earnings** – Recover your billable hours with our proprietary offering.
- **Subpoena Assistance** – provides reimbursement, up to the policy limit, for all reasonable attorneys fees and other costs, expenses and fees related to subpoena response.
- **License Protection** – provides reimbursement up to \$50,000 per disciplinary proceeding and \$100,000 in aggregate, per policy period.
- **Breach Event Expenses and Cyber Investigation Expenses** – Coverage for breach event expenses directly resulting from a privacy or security breach. As well as coverage for cyber investigation expenses directly resulting from a regulatory investigation regarding a Privacy Breach or Security Breach.
- **Reputation Coverage** – provides reimbursement up to \$25,000 reimbursement of reasonable fees, costs and expenses for consulting services provided by a public relations firms for each crisis event, up to \$50,000 for all crisis events in a policy period.

* See website for additional details.

This material is for informational purposes only. It is not intended to be exhaustive nor should any discussions or opinions be constructed as legal advice. The insurance policy language will determine the actual coverage afforded to an insured. Contact USI Affinity for any insurance questions you may have regarding your particular situation. USI Affinity is not responsible for the content of the information provided or for the consequences of any legal actions taken on the basis of the information provided.

To learn more, contact USI Affinity today:
Greg Cooke • 610.537.1446 • Greg.Cooke@usi.com
www.mybarinsurance.com/dcbar



AFFINITY