

Complete this form to receive a non-binding premium estimate. Note: If you filled out an application or premium estimate form for another broker or any insurer, send us that, instead of filling out this form.

Contact Information:

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

Current Malpractice Insurance:

Insurance Company: _____ Policy Expiration Date: _____ Policy Limits: \$ _____ / _____
 Policy Deductible: \$ _____ Retroactive Date: _____ Annual Premium: \$ _____

Attorney Roster (attach extra page, if necessary, or leave blank, and attach your policy's Individual Retroactive Date page):

Attorney Name	Start Date w/Firm	Position	Avg. Weekly Hours	State Bar Admissions/Year
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

Practice Areas Grid (Allocate your firm's last 12 months' billings; figures should add up to 100%):

Appellate	%	Elder Law	%	Municipal Gov't. (not bonds)	%
Aviation	%	Employment Law-Labor	%	Plaintiff Bodily/Personal Injury*	%
Bankruptcy	%	Employment Law-Mgmt.	%	Real Estate-Commercial*	%
Business - Contracts	%	Energy*	%	Real Estate-Develop/Synd.	%
Business - Formation	%	Environmental*	%	Real Estate-Residential*	%
Business-Transactions/M & A*	%	ERISA/Employee Benefits	%	Real Estate-Title*	%
Business - Other	%	Family – Non-Divorce	%	Real Estate-Other (describe)*	%
Civil/Commercial Lit.-Defense	%	Financial Inst./Banking*	%	Regulatory	%
Civil/Commercial Lit.-Plaintiff*	%	Gov't. Contracts/Relations	%	Securities/Bonds/SEC*	%
Civil Rights	%	Healthcare	%	Sports/Entertainment*	%
Class Action/Mass Torts*	%	Immigration/Naturalization	%	SSDI	%
Collection – Commercial*	%	Insurance Coverage	%	Tax*	%
Collection – Consumer*	%	Insurance/Self-Insured Defense	%	Telecommunications/FCC	%
Construction	%	IP - Patent*	%	Transportation	%
Criminal Defense	%	IP - Trademark/Copyright*	%	Wills/Trusts/Estates/Probate: Assets >\$5M*	%
Divorce: Assets > \$5M	%	Land Use/Zoning	%	Wills/Tr./Est./Pro: Assets \$1M-\$5M*	%
Divorce: Assets \$1M-\$5M	%	Mediation/Arbitration	%	Wills/Tr./Est./Pro.: Assets >\$1M*	%
Divorce: Assets < \$1M	%	Medical Malpractice-Defense*	%	Workers Compensation-Plaintiff	%
Education	%	Medical Malpractice-Plaintiff*	%	Other	%

Operations & Risk Management:

1. What was your firm's gross revenue in its last fiscal year: \$ _____ current fiscal year estimate: \$ _____
2. Does your firm have a calendaring/docketing system? Yes No If yes, what types of controls does it use? Check all that apply: Single Calendar Dual Calendar Pocket Calendar Computer Master Listing Tickler System Other :
3. Which conflict avoidance systems does your firm use? Computer Index File Client List Committee Memory None
4. Does your firm use any of the following letters for all clients? Check all that apply: Engagement Fee/Retainer Decline/Non-Engagement Scope of Services Change in Scope of Engagement Termination of Engagement
5. How many suits or arbitrations/mediations for unpaid fees has your firm filed in the last two years? _____
6. Has any firm lawyer ever been disciplined, or is the subject of a pending disciplinary proceeding? ** Yes No
7. Is any firm lawyer aware of any circumstances that may give rise to a malpractice claim? ** Yes No
8. How many malpractice claims or incidents has the firm or any of its lawyers incurred in the past five years? ** _____

*Supplement required. Fill out attached form or download from www.lawyersinsurer.com/apply.
 **Disciplinary Proceeding and/or Claim/Incident report(s) required, if any. Download from above webpage.

Attorney Signature: _____ Title: _____ Date: _____

Plaintiff Litigation

1. Allocate your firm's cases among the categories below; figures should add up to 100%:
 Auto/Trucking _____% Admiralty _____% Aviation _____% Asbestos _____% Civil Rights _____% Class Action/Mass Tort* _____%
 Commercial/Business _____% Employment _____% General Liability _____% Medical Malpractice _____%
 Pharmaceuticals _____% Products Liability _____% Toxic Tort _____%
2. What is your firm's average plaintiff personal injury litigation caseload per year? _____ # of attorneys handling cases _____
3. What % of the firm's litigated cases are: settled before trial _____% tried to verdict _____% handled via contingency fee _____%
4. What is the average judgment/award/settlement amount of your firm's cases? \$ _____

Real Estate

Type of Representation	% of RE Practice	Number of Cases Per Year	Average \$ Value	Largest \$ Value
Residential Closings	_____	_____	_____	_____
Commercial Closings	_____	_____	_____	_____
Residential Foreclosures	_____	_____	_____	_____
Commercial Foreclosures	_____	_____	_____	_____
Residential Land Use	_____	_____	_____	_____
Commercial Land Use	_____	_____	_____	_____
Residential Leases	_____	_____	_____	_____
Commercial Leases	_____	_____	_____	_____
Residential New Construction	_____	_____	_____	_____
Commercial New Construction	_____	_____	_____	_____
Res. Title Searches/Opinions	_____	_____	_____	_____
Comm. Title Searches/Opinions	_____	_____	_____	_____
Development	_____	_____	_____	_____
Syndications	_____	_____	_____	_____
Condo/Community Associations	_____	_____	_____	_____
Other (describe) _____	_____	_____	_____	_____

Trusts/Probate/Estates

1. List the asset value of the three largest estates/trusts to which any member of the firm provided legal services in the last 12 months. 1. \$ _____ 2. \$ _____ 3. \$ _____
2. Does the firm or any member of the firm, have the authority to write checks, provide investment advice, make investments, or have discretionary control of funds for Trust/Estate clients? Yes _____ No _____ If "Yes", describe: _____
3. Do services as trustee include making investment decisions pertaining to the purchase or sale of:
 a. Securities? Yes _____ No _____ b. Real Estate? Yes _____ No _____ c. Other Investments? Yes _____ No _____
 If "Yes" to any part of Question 2, describe the services rendered, and indicate if the firm receives commissions or fees. _____
4. Are all attorney fees approved by beneficiaries or the court before being disbursed? Yes _____ No _____

Business Transactions and Mergers & Acquisitions

1. Describe the type, size and nature of the firm's transactions and/or M&A practice: _____
2. Describe the parties represented, including any publicly-traded entities: _____
3. Did any transaction(s) require an SEC filing or an amendment to a filing: Yes _____ No _____ If yes, describe the firm's role: _____
4. Is the activity performed for one client or multiple clients? _____
5. How many such matters has the firm handled in the last three years? _____

Attorney Signature: _____ Title: _____ Date: _____