

Accountants Professional Liability Insurance



Protect Your Business and Personal Assets

Monitor Liability Managers, LLC offers comprehensive Accountants Professional Liability (APL) Insurance for small and midsize local and regional firms at competitive premiums.

Standard Coverage

- Extended Reported Period (ERP) includes options for death, disability and/or retirement
- Broad Innocent Insured provision
- 50 percent deductible credit for use of mediation or non-binding arbitration
- 10 percent additional limit for claims expense (up to \$100,000 maximum)
- State licensing board proceeding expense coverage
- Loss of earnings coverage
- Subpoena expense coverage

Additional Coverage Options

- First dollar claims expense
- Claims expense in addition to the limit
- Employment Practices defense coverage
- Nonprofit Directorship defense coverage
- Life insurance agent endorsement
- Real estate agent endorsement
- Multi-year policy options available

Program Specifics

- Limits up to \$5 million
- Deductibles as low as \$1,000

Risk Management

- Risk management and practice assistance provided to reduce the risk of litigation and offer guidance on best practices
- Available through both a toll-free number and online
- Services provided by Wilson Elser LLP

Experience, Strength and Stability

Monitor is a member company of the W. R. Berkley Corporation (NYSE: WRB). W. R. Berkley, founded in 1967, is one of the nation's premier commercial lines property casualty insurance providers.

Berkley has annualized revenues of \$4.7 billion, total assets of \$16.1 billion and stockholders' equity of \$3 billion. Insurance financial strength ratings for Berkley include: A.M. Best, "A+" (Superior), Standard & Poors "A+" (Strong) and Moody's "A2" (Strong).

Monitor issues APL policies through a W. R. Berkley member company, Carolina Casualty Insurance Company, rated "A+" (Superior), FSC: XII by A.M. Best Company.

Contact Us!

Randal P. Mrozowicz

Senior Vice President, Underwriting
(800) 446-2100, ext. 531

E-mail: aplsubmissions@monitorliability.com

Fax: (847) 806-6282

Web site: www.monitorliability.com



A Berkley Company

2850 West Golf Road, Suite 800 Rolling Meadows, IL 60008
www.monitorliability.com (800) 446-2100 Fax (847) 806-6282

Accountants Professional Liability Insurance Premium Estimate Questionnaire

Applicant Firm Information

Name of Applicant Firm	
Contact Name	
Address	
City	State
County	Zip Code
Phone Number	Fax Number
E-mail	Web Site

Coverage Options

Limits of Liability Desired (Each Claim and Annual Aggregate):

- | | |
|--|--|
| <input type="checkbox"/> \$100,000 / \$100,000 | <input type="checkbox"/> \$500,000 / \$500,000 |
| <input type="checkbox"/> \$100,000 / \$300,000 | <input type="checkbox"/> \$500,000 / \$1,000,000 |
| <input type="checkbox"/> \$250,000 / \$250,000 | <input type="checkbox"/> \$1,000,000 / \$1,000,000 |
| <input type="checkbox"/> \$250,000 / \$500,000 | <input type="checkbox"/> \$1,000,000 / \$2,000,000 |
| <input type="checkbox"/> Other: \$ _____ | |

Deductible Desired (Each Claim):

- | | | |
|--|-----------------------------------|---|
| <input type="checkbox"/> \$1,000 | <input type="checkbox"/> \$10,000 | Claims Expense: |
| <input type="checkbox"/> \$2,500 | <input type="checkbox"/> \$15,000 | <input type="checkbox"/> Inside the Limit |
| <input type="checkbox"/> \$5,000 | <input type="checkbox"/> \$20,000 | <input type="checkbox"/> Outside the Limit |
| <input type="checkbox"/> Other: \$ _____ | | <input type="checkbox"/> Both Options Desired |
| <input type="checkbox"/> First Dollar Claim Expense
(Damages Only) Deductible | | |

Additional Coverages Available by Endorsement Include:

- Employment Practices Liability Claims Expense
- Nonprofit Outside Directorship Liability Claims Expense
- Life Insurance Agent Professional Liability
- Real Estate Agent Professional Liability

Current Insurance History:

List the professional liability insurance purchased by the Applicant Firm for the past year. If "None," so state.

- None

Insurance Carrier	Inception Date	Expiration Date
Limit of Liability	Deductible	Premium
Current Policy Retroactive Date	mm/dd/yyyy	
<input type="checkbox"/> No Retroactive Date		

Forward completed questionnaire to:

Monitor Liability Managers, LLC
2850 West Golf Road, Suite 800, Rolling Meadows, IL 60008
Fax: (847) 806-6282

Contact **Randal P. Mrozowicz**, Senior Vice President, Underwriting,
at rmrozowicz@monitorliability.com, or **(800) 446-2100, ext. 531**.

Current Staffing

Indicate the total number of personnel for the Applicant Firm by full time and part time (<1,250 hours).	FT	PT
Total number of professional staff, including owners, partners and officers, employed by the Applicant Firm		
Total number of additional staff, including all administrative and/or support staff, employed by the Applicant Firm		

Gross Annual Revenue

Prior Fiscal Year	\$
Current Fiscal Year (estimated)	\$
Projected Next Fiscal Year	\$

Gross Annual Revenue for the Prior Fiscal Year by Area of Practice

Area of Practice	%
Audit/Review Services: Public Clients #_____ Public Client Audits	
Audit Services: Non-Public Clients	%
Business Tax Services	%
Estate Tax Services	%
Individual Tax Services	%
Bookkeeping and Write-Up Services	%
Payroll Accounting Services	%
Review Services: Non-Public Clients	%
Compilation Services: Non-Public Clients	%
Projection and Forecast Services	%
Business Valuation Services	%
Litigation Support Services	%
Business/Personal Management Services	%
Fiduciary Services: Trust Related	%
Fiduciary Services: Non-Trust Related	%
Fiduciary Services: Employee Benefit Plan	%
Information Technology Services	%
Assurance Services	%
Securities (Other Than Audit) Services	%
Other:	%
Other:	%
Total	100%

Claim History (Past five [5] years)

Number of Claims	
Total Estimated Dollar Amount Paid or Reserved	\$