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INSURANCE GROUP LLC

www.volkinsurance.com

LAWYERS PROFESSIONAL LIABILITY
Request for PREMIUM INDICATION

Firm Name:	Contact:	
Address	Email Address:	
City	State	Zip:

FIRM INFORMATION

Date Established	
Gross Annual Income	
Number support staff	

ATTORNEY INFORMATION

Name of Attorney	Position / Ave hrs per week	Date of Hire or Retroactive Date

INSURANCE INFORMATION

Insurance Carrier	
Liability Limits	
Deductible	
Annual Premium	
Policy Period	
Retroactive Date	

1. INTERNAL CONTROLS

- a. Do you maintain a Docket Control system with at least two independent date controls? Yes No
- b. Is your Docket system computerized?..... Yes No
- c. Are engagement and non-engagement letters used on a regular basis? Yes No
- d. Is a Conflict of Interest system maintained? Yes No
- e. Number of fee suits filed against clients in the past two (2) years:..... _____
- f. How many attorneys have participated in CLE during the past twelve months? _____

2. CLAIM HISTORY

Are you aware of any claims against your firm or any of its attorneys, or any incidents that could result in a claim against your firm or any of its attorneys, within the past five (5) years? Yes No If "YES", how many? _____
Provide specific details of each (a description of the allegations, current reserve, indemnity paid, expenses paid, etc...).

3. DISCIPLINARY ACTIONS

Has any member of the applicant firm been refused admission to practice, disbarred, suspended, reprimanded, sanctioned, or held in contempt by a court administrative agency or regulatory body? Yes No
Provide specific details of each (date, details of the events that led to the action and the action taken).

AREA OF PRACTICE PERCENTAGES (percentages must total 100%)

DEFENSE	%	Abstracting / Title	Immigration
Arbitration / Mediation		Administrative Law	International
BI/PI		Adoptions	Investment Cnslng / Money Mgt
Civil Rights / Employment		Antitrust Trade Regulations	Labor – Employee / Union
Class Action / Mass Tort		Banking / Financial Institutions	Limited Partnerships
Commercial Litigation		Bankruptcy	Local Government / Municipal
Criminal		Collection / Repossession	Mergers & Acquisitions
Insurance Company		Communication	Oil and Gas
Medical Malpractice		Construction	Patent
Workers Compensation		Copyright	Private Placements
PLAINTIFF		Corporation Formation	Public Utilities
BI/PI Plaintiff		Corporate General	Real Estate – Commercial
Civil Rights / Employment		Divorce	Real Estate – Development
Class Action / Mass Tort		Entertainment	Real Estate – Residential
Commercial Litigation		Environmental	Securities or Bonds
Medical Malpractice		Estate Planning	Social Security
Workers Compensation		ERISA	Syndications
TAX		Family Law (other than Divorce)	Trademark
Ad Valorem Tax		Fiduciary	Venture Capital
TAX – Preparation		Foreclosures	Wills and Trusts
TAX – Opinions		Health	Other:

PLEASE NOTE: This Worksheet is intended for the purpose of obtaining a Preliminary Premium Indication only.