



**Couch Braunsdorf Insurance Group**

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*Please return to: Gary L. Pinckney, Esq.  
 gpinckney@couchbraunsdorf.com*

Firm name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ County: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Contact name: \_\_\_\_\_ Title: \_\_\_\_\_  
 E-mail: \_\_\_\_\_ Website: \_\_\_\_\_  
 Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

**AREAS of PRACTICE – must equal 100%**

- |   |   |
|---|---|
| _____ % Administrative Law                    | _____ % Financial Institutions/Banking      |
| _____ % Admiralty Law                         | _____ % Government Contracts and Claims     |
| _____ % Adoption Law                          | _____ % Guardianship/Juvenile               |
| _____ % Antitrust/Trade Regulation            | _____ % Immigration and Naturalization      |
| _____ % Arbitration/Mediation                 | _____ % Insurance Defense                   |
| _____ % Bankruptcy                            | _____ % I. P. Copyrights & Trademarks       |
| _____ % Business Transactions & Contracts     | _____ % I.P. Patents                        |
| _____ % Civil Rights and Discrimination       | _____ % International Law                   |
| _____ % Class Actions/Mass Tort               | _____ % Local Government (not bonds)        |
| _____ % Collection/Repossession – Commercial  | _____ % Oil & Gas                           |
| _____ % Collection/Repossession – Consumer    | _____ % Personal Injury – Defense           |
| _____ % Commercial Litigation – Defense       | _____ % Personal Injury – Plaintiff         |
| _____ % Commercial Litigation – Plaintiff     | _____ % Real Estate – Commercial            |
| _____ % Construction/Building Contracts       | _____ % Real Estate – Foreclosure           |
| _____ % Consumer Claim                        | _____ % Real Estate – Land Use & Zoning     |
| _____ % Corporate & Business Formation        | _____ % Real Estate – Residential           |
| _____ % Corporate Mergers and Acquisitions    | _____ % Real Estate – Title                 |
| _____ % Criminal                              | _____ % Securities or Bonds                 |
| _____ % Divorce – w/ Assets < \$1M            | _____ % Social Security                     |
| _____ % Divorce – w/ Assets \$1M - \$5M       | _____ % Taxation*                           |
| _____ % Divorce – w/ Assets > \$5M            | _____ % Wills, Trusts & Estates < \$1M      |
| _____ % Employment Law – Employee /Union      | _____ % Wills, Trusts & Estates \$1M - \$5M |
| _____ % Employment Law – Employer /Management | _____ % Wills, Trusts & Estates > \$5M      |
| _____ % Entertainment                         | _____ % Workers Compensation – Defense      |
| _____ % Environmental Law                     | _____ % Workers Compensation – Plaintiff    |
| _____ % ERISA/Employee Benefits               | _____ % Other Describe): _____              |
|   | <b>100 % TOTAL</b>                          |

**DATE FIRM ESTABLISHED (including name changes):** \_\_\_\_\_

**Name and Address of BACK UP ATTORNEY (if a Sole Practitioner):** \_\_\_\_\_

**CURRENT (or desired) COVERAGE:**

Carrier: \_\_\_\_\_  
 Expiration: \_\_\_\_/\_\_\_\_/\_\_\_\_ Retroactive date: \_\_\_\_/\_\_\_\_/\_\_\_\_ # of attorneys: \_\_\_\_\_  
 Limit of liability: \$ \_\_\_\_\_ Deductible: \$ \_\_\_\_\_ Expiring Premium: \$ \_\_\_\_\_

Has this firm (regardless of name changes) been insured for at least 5 years? (Circle one) YES NO  
 If no, please provide the date from which the firm has been continuously insured: \_\_\_\_\_

**ATTORNEYS:**

Attorney name Sole practitioners please be sure to list yourself	Designation Code (See below)	State/Year Admitted	Date <i>first</i> joined the applicant firm	For Of counsel and part-time attorneys: Average # of hours worked per week

**Designation Codes:**

- O = Officers, Directors or Shareholders of the corporation who are licensed as lawyers
- E = Employed lawyers (must be employee of applicant firm)
- C = Of counsel attorneys for whom coverage is desired
- S = Sole Proprietor
- P = Partners of a Partnership
- PT = Less than 26 hours per week

**CLAIMS, POTENTIAL CLAIMS AND DISCIPLINARY ACTIONS:**

- a) Has any professional liability claim or suit been made in the *past five (5) years* against the firm or its predecessor firm(s) or any current or former member of the firm or its predecessor firm(s)? YES NO TOTAL NUMBER: \_\_\_\_\_
- b) After inquiry, does any firm member *know of any circumstance, situation, act, error or omission* that could result in a professional liability claim or suit against the firm or its predecessor firm(s) or any current or former member of the firm or its predecessor firm(s)? YES NO TOTAL NUMBER: \_\_\_\_\_

**If you answered "yes" to either A or B, please attach a copy of the Claim Supplement completed for your current Insurer and update same as needed. If you do not have a supplement, please call to request one. Do NOT send the Summons and Complaint.**

- c) Has member of the firm ever been refused admission to practice, disbarred, *suspended, reprimanded*, sanctioned or have any disciplinary complaints or ongoing disciplinary investigations? YES NO  
If yes, please provide full details including final disposition.
- d) In the past five years, has a professional liability insurer *declined* to offer coverage, *non-renewed* coverage or *cancelled* coverage for your firm? If yes, please provide details. YES NO

**SUITS FOR FEES:** How many *suits for the collection of fees* have you filed against your clients in the last 12 months? \_\_\_\_\_

**ADMINISTRATIVE CONTROLS:**

- a) Maintain a Docket Control System with at least two independent date controls? YES NO
- b) Are two separate individuals involved in managing the system? Computerized? YES NO
- c) Maintain a Conflict of Interest Avoidance system? Computerized? YES NO
- d) Any attorney serve(d) as a Director/Officer, or have equity interest in a client? YES NO
- e) Any single client represent 10% or more of your firm's total gross billings? YES NO
- f) Does the share common office space with another law firm? YES NO
- g) In the past five years, has your firm merged, been acquired, or experienced a change in membership of at least 50% of the firm's attorneys? If yes, please provide the date of change. \_\_\_\_/\_\_\_\_/\_\_\_\_
- h) Number of support staff: \_\_\_\_\_
- i) Does your Firm have a full-time legal administrator? \_\_\_\_\_ Member of the Assoc. of Legal Administrators (ALA)?
- j) How many attorneys have participated in CLE during the last 12 months? \_\_\_\_\_
- k) Estimated annual gross revenue for this year: \$ \_\_\_\_\_
- l) Circle **ALL** that apply: Engagement letters      Non-engagement letters      Disengagement letters      Retainer agreements

**Personal Injury Work (if applicable):**

Total Number of PI cases in the last 12 months:

Average dollar value of cases:

Maximum dollar value of cases:

Any med mal, mass tort or class action work?

If yes, what type & % of the overall PI work?

What % of your PI cases are:

Auto accident:

Premises Liability:

Product Liability:

Other:

% of cases referred to you by other law firms:

% of cases referred by you to other law firms:

**Real Estate Practice (if applicable):**

What % of your RE work is:

Residential Closings:

Commercial Closings:

Landlord/Tenant:

Municipal Land Use:

Other:

As regards your real estate closings during the last 12 months:

Residential

Commercial

Approximate number of transactions:

Average size/value of transaction:

Largest size/value of transaction:

**Estate/Trust/Probate Practice (if applicable):**

Does the practice area only entail the preparation of simple wills & probate administration?

Any authority to write checks?

Any investment advice or discretionary investment authority?

Any firm lawyer act as a Trustee & if yes what is the approximate value of the trust?

Does the value of any estate/trust exceed 5M?

**Matrimonial (Divorce) Practice (if applicable):**

What has been the average value of property settlement handled?

What has been the highest value of property settlement handled?

**PLEASE ATTACH A SAMPLE OF YOUR FIRM'S LETTERHEAD & CURRENT DECLARATIONS PAGE**

\_\_\_\_\_  
Signature of Owner, Partner, Managing Member

\_\_\_\_\_  
Date