

Law Firm Name: _____

1. a. Name of the Title Agency: _____
 b. Does the Title Agency have it's own letterhead? ☐ Yes ☐ No
If yes, please attach a copy of the letterhead.
 c. Does the Title Agency have an address that is different that the Law Firm? ☐ Yes ☐ No
If yes, please provide the address and explanation. _____

2. Does the law firm, or any lawyer in the law firm, own 100% of the Title Agency? ☐ Yes ☐ No
If "no", the Title Agency may not be eligible for coverage under the AttorneyShield policy.

3. a. Provide the date the Title Agency was established: _____
 b. In the past 5 years, has the Agency acquired/been acquired, consolidated, purchased or merged with any other Title Agency? ☐ Yes ☐ No
If yes, please provide the Predecessor information for past 5 years.

Predecessor Title Agency	Date Established (year)	Date Acquired (year)

4. Which lawyers are Title Insurance Agents?

Lawyer	State(s) in which a Title Agent license is held.	Provide written opinions?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

5. How many support staff are employed by the Title Agency? _____

6. a. What was the Title Agency's gross revenue in the last completed fiscal year? _____
 b. What is the Title Agency's estimated gross revenue for the current fiscal year? _____
 c. Indicate the percent of revenue broken down by the following: Residential _____% Commercial _____%

7. a. What is the average annual number of closing transactions handled by the Title Agency? _____
 b. What is the average annual number of title searches handled by the Title Agency? _____
 c. Indicate the number of title searches completed on behalf of the law firm over the past 12 months:
 By the Title Agency _____ By outside sources/entities _____

8. Indicate each company the Title Agency represents, the annual premium volume and the Title Agency's authority.

Company	Annual premium volume	Do you have binding authority?	Do you process or issue policies?
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

9. Does any person in the Title Agency also control, manage, operate or own any construction firm, real estate development company or real estate investment company? ☐ Yes ☐ No
If yes, please provide a description.

10. Has any person in the Title Agency ever had their Title Agent license suspended or revoked? ☐ Yes ☐ No
If yes, please provide a description.

11. After inquiry of all lawyers and employees of the Title Agency, is any such person aware of:
- A professional liability claim made in the past 5 years (either still open or closed)? ☐ Yes ☐ No
 - An act or omission that might reasonably be expected to be the basis of a claim? ☐ Yes ☐ No
- If yes to any part of Question #11, please list the claimant's name for each claim made or act or omission referenced above. You will be required to complete an Incident/Claims Supplement for each claimant listed.***

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For residents of all states except CO: Any person who knowingly and with intent to defraud any insurance company or other person, files an application for insurance containing any materially false information or conceals, for the purpose of misleading, information concerning any fact material thereto or knowingly helps with intent to defraud, commits a fraudulent insurance act, which may be a crime and may subject the person to criminal and civil penalties.

Colorado: It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance and civil damages. Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

Professional liability insurance offered through Attorney Shield is underwritten by Professional Solutions Insurance Company (doing business in California as PSIC Insurance Company).

Signature/Title of Law Firm Representative

Date

Soliciting Agent

Agency Name



Mail to:
14001 University Avenue
Clive, Iowa 50325

Questions:
Phone: 800-510-8240
Fax: 800-480-2232