

Lawyers Professional Liability

SHORT APPLICATION

Grayhawk General Agency



Applicant / Firm

Firm Name:		Contact:
Email:	Phone:	Website:
Location address:		Date established:
Mailing address:		# of locations:
Total number of attorneys:	# Support staff (non-atty) (FT): (PT):	Gross revenue past 12 months:
Back-up atty (solo firm) Name:	Address:	Phone:

Attorneys

	Full Lawyer Name	*Status	Avg Hours / Week	Date of Hire mm/dd/yyyy	Admitted Date mm/dd/yyyy	State	Individual Retro mm/dd/yyyy
# 1				/ /	/ /		/ /
# 2				/ /	/ /		/ /
# 3				/ /	/ /		/ /
# 4				/ /	/ /		/ /
# 5				/ /	/ /		/ /
# 6				/ /	/ /		/ /
# 7				/ /	/ /		/ /
# 8				/ /	/ /		/ /
# 9				/ /	/ /		/ /
# 10				/ /	/ /		/ /

→ *STATUS: "O"=Owner, "P"=Partner, "E"=Employed Atty, "PT"=Part Time, "OC"= Of Counsel, "IC"=Independent Contractor

Predecessors

Name(s) of Qualifying Predecessor Firm(s)	Date(s) Established mm/dd/yyyy	Date(s) of Merger or Dissolution	# of Employed Lawyers at Pred Firm	# of Principals or Partners at Pred Firm	% of Ownership Retained by Applicant
	/ /	/ /	#	#	%
	/ /	/ /	#	#	%

Office Procedures

Computerized Docket System? <input type="checkbox"/> Yes <input type="checkbox"/> No	Conflict of Interest System <input type="checkbox"/> Yes <input type="checkbox"/> No	Engagement Letters <input type="checkbox"/> Yes <input type="checkbox"/> No
Docket System with Two (+) Independent Date Controls <input type="checkbox"/> Yes <input type="checkbox"/> No	# of Suits for Fees within most recent two (2) years #	Disengagement Letters <input type="checkbox"/> Yes <input type="checkbox"/> No
		Termination Letters <input type="checkbox"/> Yes <input type="checkbox"/> No

Requested Limits & Deductibles

Limit Options (per claim/aggregate)				Deductible Options (per claim)			
<input type="checkbox"/> \$250k/\$500k	<input type="checkbox"/> \$500k/\$1m	<input type="checkbox"/> \$2m/\$2m	<input type="checkbox"/> \$4m/\$4m	<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$5,000	<input type="checkbox"/> \$15,000	<input type="checkbox"/> \$25,000
<input type="checkbox"/> \$500k/\$500k	<input type="checkbox"/> \$1m/\$1m	<input type="checkbox"/> \$3m/\$3m	<input type="checkbox"/> \$5m/\$5m	<input type="checkbox"/> \$2,500	<input type="checkbox"/> \$10,000	<input type="checkbox"/> \$20,000	<input type="checkbox"/> \$50,000
<input type="checkbox"/> CEOL	Other:			<input type="checkbox"/> FDD	Other:		

Current Insurance

Check here, if none

Policy Term mm/dd/yy	Carrier	Limits Per Claim	Aggregate	Have CEOL?	Ded	Have FDD?	Premium	# of Attys	Firm's Retro mm/dd/yyyy
/ / to / /				<input type="checkbox"/> Yes		<input type="checkbox"/> Yes			/ /
/ / to / /				<input type="checkbox"/> Yes		<input type="checkbox"/> Yes			/ /
/ / to / /				<input type="checkbox"/> Yes		<input type="checkbox"/> Yes			/ /
/ / to / /				<input type="checkbox"/> Yes		<input type="checkbox"/> Yes			/ /
/ / to / /				<input type="checkbox"/> Yes		<input type="checkbox"/> Yes			/ /



Areas of Practice

Apply the percentage of the Firm's gross billings devoted to each applicable category during the past twelve (12) months for a total of **100%**

→ * (asterisk) Indicates applicable supplement(s) may be required

%	Admiralty / Marine – Defense	%	Immigration
%	* Admiralty / Marine – Plaintiff	%	International
%	* Agent Practice and Entertainment Law	%	* Intellectual Property – Trademark, Copyright, Registrations & Licensing
%	Business Formation	%	* Intellectual Property – Patent
%	Business Transactions – Value of the transactions under \$500,000	%	Juvenile rights, guardian <i>ad litem</i>
%	Business Transactions – Value of the transactions over \$500,000	%	Mediation, Arbitration
%	Cannabis Law	%	Mergers & Acquisitions
%	Civil Litigation – General	%	* Municipal – Finance or Bonds
%	Commercial & Corporate Litigation - Defense	%	Municipal – General (not finance)
%	Commercial & Corporate Litigation - Plaintiff	%	Oil & Gas, Mineral Rights
%	Corporate Finance	%	OTHER (Provide details below)
%	Corporate Formation	%	* Plaintiff Litigation – Class Actions &/or Mass Tort
%	Collections	%	* Plaintiff Litigation – Medical Malpractice
%	Bankruptcy	%	* Plaintiff Litigation – Social Security, Workers Comp
%	Criminal Defense	%	* Plaintiff Personal Injury – Value of the cases under \$250,000
%	Defense Litigation & Insurance Carrier Representation	%	* Plaintiff Personal Injury – Value of the cases over \$250,000
%	Elder Law	%	Public Utilities (not finance)
%	Employee Benefit Plans, ERISA	%	* Real Estate Finance
%	Employment Law – Employee Representation	%	* Real Estate (Res. & Basic Commercial) – Value of the transaction under \$1m
%	Employment Law – Management Representation	%	* Real Estate (Res. & Basic Commercial) – Value of the transactions over \$1m
%	Employment Law – Union Representation	%	Schools & Education (not finance)
%	Environmental Regulatory	%	* Securities – Private Placement
%	* Estates/Trusts/Wills – Estate Values under \$1m	%	* Securities – Public Registration
%	* Estates/Trusts/Wills – Estate Values over \$1m	%	Tax Preparation
%	Family Law – Non-Divorce	%	Tax Opinions
%	Family Law – Divorce Estate Values under \$1m	%	Tribal Law
%	Family Law – Divorce Estate Values over \$1m	%	Water Rights
		%	AOP TOTAL (MUST EQUAL 100%)

→ Additional information regarding Areas of Practice (AOP)

Claim and Disciplinary Activity

Number of claims & suits made against the firm, or any lawyer in the firm, within the past five years:	#
Number of incidents &/or circumstances that might result in a claim within the past five years:	#
→ A Claim Supplement will be required for each claim, incident &/or circumstance	
Has any current or former member of the firm been refused admission to practice, or been disbarred, suspended, reprimanded, fined or held in contempt?	☐Yes ☐No
Has the applicant firm had any previous professional liability insurance cancelled or nonrenewed?	☐Yes ☐No

→ Briefly describe any disciplinary actions or non-renewal notices

CLICK TO
RESET ALL FIELDS