

PROBATE/WILLS/ESTATES SUPPLEMENT

INSTRUCTIONS:

1. Please answer all the questions. This information is required to make an underwriting and pricing evaluation. Your answers hereunder are considered legally material to that evaluation.
2. If a question is not applicable, state "N/A". If more space is required to answer a question, please provide details on the last page of the **Application**, or attach additional sheets as necessary.
3. Please sign this supplement to include this completed form as part of the **Application**.

Named Insured/ Applicant: _____

1. Please complete the following chart for the three largest Estates or Trusts for which your Firm provided legal services in the past three years:

Name of Estate or Trust	Date Established	Attorney Responsible	Approx. Value of Estate or Trust	% of Attorney's Total Billings
				%
				%
				%

2. Please estimate the percentage of your Estates & Trusts clients that fall into the following categories?
The total must equal 100%.

Assets < \$1m	_____	%
Assets \$1- \$5m	_____	%
Assets > \$5m	_____	%
		100%

3. Does the Firm or any of its attorneys ever serve as Executors or Personal Representatives of estates (not including their own families)? YES NO
4. Does the Firm allow any attorney to accept gifts or bequests from Estates & Trusts clients? YES NO
5. Do services for any Estates & Trusts clients include investment decisions resulting in the purchase or sale of securities, real estate or other investments? YES NO
6. Does the Firm allow attorneys to accept compensation from the purchase or sale of estate or trust assets in the form of a commission or fee? YES NO

Fraud Prevention – General Warning

Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

SIGNED: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____