



J. H. FERGUSON & ASSOCIATES, INC.
 A Member of the United National Group

APPLICATION
TAX PREPARATION AND BOOKKEEPING ERRORS AND OMISSIONS INSURANCE
CLAIMS MADE POLICY

THIS IS AN APPLICATION FOR A POLICY WITH LIMITS OF LIABILITY WHICH INCLUDE BOTH DAMAGES AND CLAIM EXPENSES. IF THERE IS ANY QUESTION, PLEASE CONSULT WITH YOUR AGENT, BROKER, OR ATTORNEY.

QUESTIONS	ANSWERS												
1. Full name and address of Applicant.	1.												
2. Address(es) of Branch Office(s).	2.												
3. Date Established.	3. _____												
4. The Applicant is:	4. <input type="checkbox"/> Individual; <input type="checkbox"/> Partnership; <input type="checkbox"/> Corporation; <input type="checkbox"/> _____.												
5. Furnish the number of Partners and Staff: a) Principals/Partners; b) Professional Staff; c) Other Employees (Secretaries, Clerks, etc.).	5. <table border="0"> <tr> <td></td> <td align="center">Full Time</td> <td align="center">Part Time</td> </tr> <tr> <td>a)</td> <td align="center">_____</td> <td align="center">_____</td> </tr> <tr> <td>b)</td> <td align="center">_____</td> <td align="center">_____</td> </tr> <tr> <td>c)</td> <td align="center">_____</td> <td align="center">_____</td> </tr> </table>		Full Time	Part Time	a)	_____	_____	b)	_____	_____	c)	_____	_____
	Full Time	Part Time											
a)	_____	_____											
b)	_____	_____											
c)	_____	_____											
6. a) Furnish the following information on all principals and key employees:	6. a)												
<table border="0"> <tr> <td><u>Full Name</u></td> <td><u>No. Years Experience</u></td> <td><u>Professional Qualifications</u></td> <td><u>How Long a Principal</u></td> </tr> </table>	<u>Full Name</u>	<u>No. Years Experience</u>	<u>Professional Qualifications</u>	<u>How Long a Principal</u>									
<u>Full Name</u>	<u>No. Years Experience</u>	<u>Professional Qualifications</u>	<u>How Long a Principal</u>										

b) If the business is not more than TWO years old, attach resumes of the principals and key employees.	b)												
7. a) Furnish estimated gross receipts for the NEXT fiscal year;	7. a) \$ _____												
b) Furnish gross receipts for the current year and the past TWO years.	b) 19__ \$ _____ 19__ \$ _____ 19__ \$ _____												