

COMPLETE THIS APPLICATION ONLY IF REQUESTING COVERAGE FOR TRUSTEE PROFESSIONAL RELATED ERRORS AND OMISSIONS LIABILITY COVERAGE. Please submit with the Advantage[®] Miscellaneous Professional Liability Application. Please complete in ink. A principal must sign both the supplement and the miscellaneous professional liability application.

THIS APPLICATION IS FOR A CLAIMS-MADE INSURANCE POLICY.

Instructions to the applicant:

- Please answer all questions. This information is required to make an underwriting and pricing evaluation. Your answers hereunder are considered material to that evaluation.
- If a question is not applicable, state N/A. If more space is required, please attach a separate exhibit with the question number.
- Application must be signed and dated by an authorized person of the company.
- Please provide resumes of all Trustees seeking coverage and a copy of the Trust agreement.

1. Applicant Name _____
2. Please explain the professional services being provided as the trustee or escrow agent of the trust or escrowed property or money. Please provide detailed information as to the type of trust or fund or which professional services are being provided. **Attach a copy of the trust agreement.** _____
3. What is the trust asset size? \$ _____
4. a. Does the Trustees have authority to invest in any way the money in the trust or the fund? Yes No
b. Is the authority provided in writing? Yes No
c. Is the authority discretionary? Yes No
d. Is an independent investment counselor used? Yes No
e. Are trust funds commingled with any other funds? Yes No
5. Please provide controls in place to monitor the investment of funds, distribution of trust assets and 3rd parties who oversee such activity. _____
6. Is Directors & Officers coverage in place for any entities operated within the trust? Yes No
If yes, please provide limits and effective dates.
Carrier: _____
Limits of Liability: _____
Effective Dates: _____
7. Is a Certified Public Accountant used to prepare and file tax returns for the trusts or accounts? Yes No
8. Have any funds of the Trust been invested in any entity, real estate or other venture or project in which a Trustee has an interest either indirectly or directly, or from which a Trustee will derive any benefit, or have any Trustees had a loan from the trust? Yes No

If yes, please provide details. _____

9. Are any of the Trustees beneficiaries of the Trust? Yes No

If yes, please provide details. _____

Signed: _____

Title: _____

Date: _____

Broker: _____

Address: _____