CATLIN

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: _____

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