



Not-for-Profit Management Liability Application

Insured Persons & Organization Liability, Employment Practices Liability, and Fiduciary Liability
Including Optional Business Owners' Package

I. GENERAL APPLICANT INFORMATION:

Applicant's Name _____
 Location Address _____ City _____ State _____ Zip _____
 Website _____ Mailing Address (if different than location) _____
 Officer Contact _____ Phone Number _____

II. GENERAL UNDERWRITING INFORMATION & ELIGIBILITY:

1. Description of Operations _____
2. Annual Revenue \$ _____
3. Fund balance (Total Assets – Total Liabilities) \$ _____
4. Employee Count

Full Time	Part Time	Seasonal/Temporary	Volunteer

5. Date of Incorporation _____

**If any questions below are answered yes, please provide details on a separate attachment.*

6. Does the proposed **Insured** offer services to individuals under the age of 18? Yes No
7. Does the proposed **Insured** offer a Professional Service? Yes No
8. Does the proposed **Insured** have plans for or have there been mergers/acquisitions/down-sizing (within the past or future 12 months)? Yes No
9. Does the proposed **Insured** have a Subsidiary(s)/Affiliated Entity(s)? Yes No
 - a. If yes, is the proposed **Insured** seeking coverage for the Entity(s)? Yes No
10. Has the proposed **Insured's** insurance been non-renewed or cancelled (within the past 5 years)? Yes No
11. Is the proposed **Insured** currently or anticipating bringing litigation? Yes No

III. PRIOR INSURANCE INFORMATION:

Describe any current insurance maintained.

<u>Coverage</u>	<u>Yes</u>	<u>No</u>	<u>Limits</u>	<u>Continuity Date</u>	<u>Expiring Premium</u>
Insured Persons and Organization Liability	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Employment Practices Liability	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Fiduciary Liability	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____

IV. CLAIMS INFORMATION:

1. Has there been, or is there now pending, any **Claims(s)** against any proposed **Insured**? Yes No
2. Does any proposed **Insured** have knowledge or information of any act, error, omission, fact, circumstance, inquiry or investigation which might give rise to a **Claim** under the proposed **Policy**? Yes No
3. During the last 5 years have any of the **Insureds** been involved in any administrative proceedings before the Equal Employment Opportunity Commission, the U.S. Department of Labor, including the Office of Federal Contract Compliance Programs, or any state or local government agency whose purpose is to address employment-related claims? Yes No
4. Have any **Insureds** ever been the subject of a disciplinary action or required to comply with any judicial or administrative agreement, order, decree or judgment? Yes No



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V. FIDUCIARY LIABILITY INFORMATION:

1. Indicate the type of plans to be insured:
 Welfare Benefit Pension Profit Sharing Other _____
2. Do all of the plans conform to the standards of eligibility, participation, vesting and other provisions of the Employee Retirement Income Security Act of 1974, as amended? Yes No
3. Are any of the plans underfunded? Yes No
4. Are any of the plans a multi-employer plan? Yes No

VI. OPTIONAL BOP QUESTIONNAIRE FOR GENERAL LIABILITY AND PROPERTY COVERAGE:

1. Number of active members _____
2. Square footage of space _____
3. Select type of non-profit office exposure:
 Building or Premises Owned Leased Other _____
4. Is the organization involved in any accreditation, standard setting, or credentialing? Yes No
5. Does the applicant's location have functioning and operations smoke detectors? Yes No
6. Does the applicant's location have fully serviced fire extinguishers? Yes No
7. Does the organization have an automobile policy in place? Yes No
8. Does the organization own any autos or lease any autos on a long term basis? Yes No
9. Does the organization regularly deliver goods or products or require its employees or volunteers to transport clients? Yes No
7. Does the organization have an international operations or exposures? Yes No
8. Does the organization need to add coverage for an additional insured (other than Manager/ Lessor of Premises)? *If yes, please provide information regarding additional insured.* Yes No
9. Have there been any General Liability or Property claims in the last 5 years? Yes No
10. Please enter the number of Special Events the applicant hosts or participates in annually _____
Average attendees per event _____

NOTICE TO ALL APPLICANTS:

ANY PERSON WHO KNOWINGLY AND WITH INTENT TO DEFRAUD ANY INSURANCE COMPANY OR ANOTHER PERSON, FILES AN APPLICATION FOR INSURANCE OR STATEMENT OF CLAIM CONTAINING ANY MATERIALLY FALSE INFORMATION, OR CONCEALS INFORMATION FOR THE PURPOSE OF MISLEADING, COMMITS A FRAUDULENT INSURANCE ACT, WHICH IS A CRIME AND MAY SUBJECT SUCH PERSON TO CRIMINAL AND CIVIL PENALTIES.

NOTICE TO APPLICANTS. PLEASE READ CAREFULLY

BY SIGNING THIS APPLICATION, THE APPLICANT, ON BEHALF OF ALL PROPOSED INSURED, REPRESENTS TO THE COMPANY THAT ALL STATEMENTS MADE IN THIS APPLICATION AND ATTACHMENTS HERETO ABOUT THE APPLICANT, ITS SUBSIDIARIES, AND THEIR OPERATIONS ARE TRUE AND COMPLETE, AND THAT NO MATERIAL FACTS HAVE BEEN MISSTATED, OMITTED, SUPPRESSED, CONCEALED, OR MISREPRESENTED IN THIS APPLICATION OR ITS ATTACHMENTS. THE APPLICANT UNDERSTANDS AND AGREES THAT IF, AFTER THE DATE OF THIS APPLICATION AND PRIOR TO THE EFFECTIVE DATE OF ANY POLICY BASED ON THIS APPLICATION AND ATTACHMENTS, ANY OCCURRENCE, EVENT OR OTHER CIRCUMSTANCE SHOULD RENDER ANY OF THE INFORMATION CONTAINED IN THIS APPLICATION INACCURATE OR INCOMPLETE, THEN THE APPLICANT SHALL NOTIFY THE COMPANY OF SUCH OCCURRENCE, EVENT OR CIRCUMSTANCE AND SHALL PROVIDE THE COMPANY WITH INFORMATION THAT WOULD COMPLETE, UPDATE OR CORRECT SUCH INFORMATION. ANY OUTSTANDING QUOTATIONS MAY BE MODIFIED OR WITHDRAWN AT THE SOLE DISCRETION OF THE COMPANY.

COMPLETION OF THIS FORM DOES NOT BIND COVERAGE. THE APPLICANT'S ACCEPTANCE OF THE COMPANY'S QUOTATION IS REQUIRED BEFORE THE INSURANCE MAY BE BOUND AND A POLICY ISSUED. THE APPLICANT UNDERSTANDS AND AGREES THAT THE COMPANY, IN PROPOSING TO PROVIDE INSURANCE, HAS RELIED ON THIS APPLICATION AND ALL ATTACHMENTS, AND



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THAT THIS APPLICATION AND ALL ATTACHMENTS ,ARE (1) MATERIAL AND THE BASIS OF THE CONTRACT WITH THE COMPANY, AND (2) DEEMED TO BE A PART OF THE POLICY TO BE ISSUED AS IF PHYSICALLY ATTACHED THERETO. THE APPLICANT HEREBY AUTHORIZES THE RELEASE OF CLAIMS INFORMATION FROM ANY PRIOR INSURERS TO THE COMPANY.

THE UNDERSIGNED OFFICER OF THE APPLICANT CERTIFIES AND REPRESENTS THAT HE/SHE IS DULY AUTHORIZED TO EXECUTE THIS APPLICATION ON BEHALF OF THE APPLICANT AND ITS SUBSIDIARIES.

Applicant's Signature:

(Must be signed by an Officer or Executive Director of the Applicant)

Print Name and Title

____/____/____
Date (Mo./Day/Yr.)