

## Real Estate Supplement

1. In the past five (5) years has the Applicant had more than two (2) residential transactions greater than \$5MM or commercial greater than \$50MM? Yes No

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2. Does the Applicant firm verify the property description with the owner? Yes No

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3. Does the Applicant firm require all parties to represent and warrant all substantive elements of the transaction have been fully disclosed? Yes No

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4. Does the Applicant firm verify that all settlement statements are calculated accurately and reconcile with each other? Yes No

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5. Does the Applicant firm require signoffs from both parties on all document modifications? Yes No

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6. Does the Applicant avoid inadvertent attorney/client relationships by having the non-represented party sign an acknowledgement? Yes No

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7. During the past year, what percentage of the cases does the Applicant firm hold escrow funds? \_\_\_\_\_ %

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8. In the past five (5) years, of the total commercial real estate transactions handled by the Applicant Firm, what percentage involved syndications, master limited partnerships, REITs, or any other transaction involving more than five (5) passive investors? Yes No

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9. In the past 12 months, what is the average annual number of real estate transactions other than purchase or sale handled by the Applicant Firm in each category below?
 

a. Mortgages, refinancing:	d. Litigation other than foreclosures:
b. Foreclosures / Loan Workouts	e. Zoning, Eminent Domain, Tax Assessment Appeals:
c. Title Searches / Document Preparation:	f. Landlord/Tenant Disputes
g. Other Describe: _____	

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10. In the past five (5) years, with respect to title work handled by the Applicant Firm, has the Applicant performed title searches? Yes No  
 If yes, please provide the number of searches during the past year under the categories shown below:
 

Party Performing Search	Residential Searches	Commercial Searches
i. Lawyer of Applicant Firm:		
ii. Non-lawyer employee of Applicant Firm:		
iii. Lawyer not a member of Applicant Firm:		
iv. Non-lawyer subcontractor:		

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11. Does the Applicant Firm, or any lawyer for whom coverage is sought, wholly own a title agency? Yes No
  - a. If "Yes", is coverage sought for such Title Agency as an additional insured on policy? Yes No
  - b. Are at least 75% of the clients of said Title Agency also clients of the Applicant Firm? Yes No

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12. In the past five (5) years has any lawyer for whom coverage is sought acted as a title insurance agent? Yes No

APPLICANT UNDERSTANDS THE INFORMATION SUBMITTED HEREIN BECOMES A PART OF THE APPLICANT'S LAWYERS PROFESSIONAL LIABILITY INSURANCE APPLICATION AND IS SUBJECT TO THE SAME REPRESENTATIONS AND CONDITIONS.

### Sign and date in ink

Signature:

Title:

Date:

Printed Name:

Name of Firm: