

**ALPS Application for Lawyers' Professional Liability Insurance**

If more than one attorney practices in this area, one supplement will suffice. All attorneys indicating this area of practice on their IAS must be listed on this supplement.

Name of Applicant Firm: \_\_\_\_\_

1. List the attorneys within the firm engaged in the practice area of taxation. For each attorney, state the number of years practicing in this area and whether the attorney has received an advanced law degree in taxation (e.g. LLM) or is licensed as a certified public accountant.

Name of Attorney	Years of Experience	Advanced Degree

2. Does any member of the firm provide investment counselor services, including tax opinions on tax shelters?  Yes  No

**If yes, please describe:**

3. Does the firm prepare tax returns for or on behalf of clients?  Yes  No

- a. If yes, what types of tax returns are prepared? (e.g. individual income tax returns, corporate tax returns, estate gift tax returns, gift tax returns, etc.)

- b. If yes, how many tax returns does the firm prepare on an annual basis? \_\_\_\_\_

- c. If yes, does the firm utilize computer software to assist in preparation of tax returns?  Yes  No

4. By separate attachment, please describe in narrative form the types of services performed in conjunction with the firm's tax practice.

I understand information submitted herein becomes part of my firm's Professional Liability Application and is subject to the same terms and conditions.

Applicant Signature \_\_\_\_\_ Position \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_

Producer's Signature \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_