



LAWYERS PROFESSIONAL LIABILITY INSURANCE FINANCIAL INSTITUTION SUPPLEMENT

Medmarc Casualty Insurance Company • 14280 Park Meadow Drive • Suite 300 • Chantilly, VA 20151-2219 • 800.356.6886 • 703.652.1300 Please complete this supplement if any lawyer listed on the application shows a percentage in the Banking/Financial Institutions area of practice. Name of Applicant Firm: ___ What percentage of your services is for financial institution clients?.... Of the percentage listed above, advise the percentage of these services that include: Residential: loan documentation, real estate closings, foreclosures or title work..... Ъ. Financial/Investment advisory services % C. d. Bankruptcy or collection ______ e. a. Average number of trusts handled per year b. Average trust value c. Highest trust value Other:_ 3. Has the applicant rendered legal opinions regarding the legality, appropriateness or efficacy of any tax benefit transactions, tax treatment, tax strategy or tax shelters? Complete the following for all Financial Institution clients. Attach additional sheets as needed. Percent Involvement Insured by Initial formation Indicate all positions Name and address of Equity with loan the FDIC or securities Provide details for all Financial Institution held Interest approvals? or NCUA? services? services provided FDIC ☐ Director NCUA ☐ Officer Yes Yes Other Loan Comm. Gen. Counsel No No None ☐ Director FDIC **NCUA** ☐ Officer Yes Yes Loan Comm. Other No No None Gen. Counsel П FDIC ☐ Director **NCUA** ☐ Officer Yes П Yes Other ☐ Loan Comm. П П No No None Gen. Counsel The undersigned represents that the statements set forth herein are true, complete and accurate and that there has been no attempt at suppression or misstatement of any material facts known, or which should have been known, and agrees that this application will be included in the basis of any coverage that may be issued by the Company. Signature of Partner, Officer or Owner of Applicant Firm:_______ Date: ______

_____ Title: _____

Print or Type Name:_