

Areas of Practice Supplement: Real Estate & Estate, Trust, Probate

Policy Number _____

Please print legibly and answer all questions. If a question is not applicable, write "N/A." If additional space is needed, please attach the information and reference the question.

1. General Information: Applicant (Firm) Name _____

Street Address _____ City _____ State _____ Zip _____

2. In regards to Applicant's services provided to Estate, Trust, Probate clients, check all that apply:

- Discretionary control of client funds Authority to write checks Provide investment advice Make investments
- Purchase or management of real estate Applicant confirms in writing it outsources all tax work Applicant handles all tax matters
- Applicant confirms in writing it provides no tax advice Estate Trust Probate work does not require tax advice Tax Other _____
- Act as executor, trustee, or personal representative. If checked, please explain: _____

3. Please list Applicant's five largest estates:

Total estate, trust or asset size	Date estate last updated

4. In connection with the provisions of legal services related to real estate by the Applicant, please check all that apply:

- Act in dual capacity representing buyer and seller
- Require a thorough review with the client of the possible economic impact of potential environmental issues
- Require an investigation of environmental risks before purchase or lease terms and conditions are finalized
- Consistently use non-engagement letters for parties you do not represent
- Consistently use engagement letters that advise the client to seek independent professional evaluation of potential environmental issues
- Require errors & omissions insurance for any entity other than Applicant performing title abstracting, surveying or appraisal work
- Provide services relating to the formation, management or group investment/syndications for real estate investing

Areas of Focus within Real Estate	Latest Year		Previous Year		Latest Year		Previous Year		24 Months
	% of Total Residential Real Estate	% of Total Commercial Real Estate	% of Total Residential Real Estate	% of Total Commercial Real Estate	# of Residential Transactions	# of Commercial Transactions	# of Residential Transactions	# of Commercial Transactions	Max. Value
Purchase & Sale									
Land Use/Development									
Mortgage & Deeds									
Loan Workouts/Foreclosure									
Condos, Co-ops & Townhomes									
Landlord/Tenant									
Property Valuation/ Real Estate Tax Abatement									
Syndications/ Real Estate Investment									
Construction/Mechanics Liens									
Eminent Domain									
Title Opinions									
Other Title/Abstract Work									
Other									

MANDATORY: All Florida applicants must read the following:

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.