

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 |
|-----------------------------------|--------------------------|
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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 | | | | | | | | | |