



The USI Affinity Lawyers' Professional Liability Insurance Program

The USI Affinity Difference

Now Available in Tennessee!

The USI Affinity Lawyers' Professional Liability Program for Tennessee attorneys and their firms. Offering comprehensive coverage, excellent service and competitive rates.

60 Years

Over 60 years of experience in Lawyers' Professional Liability insurance.



USI Affinity has the expertise and market leverage to design comprehensive and innovative insurance and benefits packages for Tennessee law firms.



USI Affinity offers unique advantages in coverage, price and service.



Supported by the strength of an "A" rated carrier.



USI Affinity built its leadership position on personal service; representatives work closely with law firms to understand their practice, from the risks they face to their benefits and administrative needs, then design a plan tailored to fit the firm's individual needs.



Access to exclusive risk management and loss prevention services.



Broad coverage and policy features tailored to meet the needs of TN law firms.



Pro bono work is definitively covered.

Limits up to **\$10,000,000**

available for all qualified Tennessee law firms.



Choice of defense costs inside or outside the limit of liability available for qualified firms.



Liberalization clause – if the company adopts any revision that broadens coverage under the policy, it will apply immediately at no additional premium at any time during the policy period.

Free ERP

Tail for retired attorneys in good standing who have been insured with the company for at least 3 years.



Easy Claim reporting.

- **Robust Coverages and Risk Management Offerings Designed Specially for TN attorneys**
- **Competitive Pricing**
- **Knowledgeable and Experienced Customer Service**

What is covered:

- ➔ *Court attendance expense reimbursement \$500/day to a maximum of \$10,000 per claim and \$50,000 in the aggregate, no deductible applies*
- ➔ *The company will provide up to \$25,000/\$50,000 per policy period for the defense of a disciplinary proceeding, no deductible applies and any payment is in addition to the limit of liability*
- ➔ *Multiple extended reporting period options, including an unlimited option*
- ➔ *Subpoena coverage of up to \$25,000 per policy period, no deductible applies and any payment is in addition to the limit of liability*
- ➔ *Broad definition of legal services include services for others as a lawyer, arbiter, mediator, title agent, a notary public, expert witness, government advisor, lobbyist, or member of a bar association, ethics, peer review, or similar board or committee and as an administrator conservator, receiver, executor, guardian, trustee, or in a fiduciary capacity (excluding ERISA)*
- ➔ *Coverage for Privacy Breach Investigation (\$20,000 per policy period) and net-work Security Breach (\$25,000 per policy period) are now included*

Ben Holloway

732.862.5476 610.362.8543

Ben.Holloway@usiaffinity.com

www.mybarinsurance.com/tn



AFFINITY

Lawyers' Professional Liability Program Indication Request Form

This form is for a non-binding indication based upon this preliminary information. It is not intended to be a binding quote for the firm's acceptance of insurance coverage. To determine the firm's qualification for a binding quote, we will need a fully completed, signed and dated application with any supplemental information.

Contact Information

Firm: _____ Est Date: _____ Street Address: _____
 City: _____ State: _____ Zip: _____ County: _____ Phone: _____
 Fax: _____ Email: _____ Website: _____

Insurance History

Current Carrier: _____ Expiration Date: ____/____/____ Limits: ____/____/____
 Deductible: _____ Retroactive Date: ____/____/____ Annual Premium: _____

Attorney Information

| Name of Attorney | Date of Hire | Bar Admission Date | Position | Avg. Weekly Hours |
|------------------|--------------|--------------------|----------|-------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

* Please list additional attorneys on a separate sheet of paper*

Area of Practice Information

| | | | | | |
|-------------------------------|---|--------------------------------|---|--------------------------------|---|
| Administrative Law | % | Financial Institution | % | Natural Resources | % |
| Admiralty Law | % | Financial Planning | % | Pension and Employee Benefits | % |
| Antitrust/Trade | % | Government Contracts/Relations | % | Pers. Injury and Neg. - Def. | % |
| Civil Rights/Discrimination | % | Healthcare | % | Pers. Injury and Neg. - Pltf. | % |
| Collection/Bankruptcy | % | Immigration and Naturalization | % | Plaintiff Class Action | % |
| Construction Law | % | Insurance | % | Plaintiff Mass Tort | % |
| Consumer Law | % | IP - Patent/Trademark | % | Real Estate/Title Agent - Res. | % |
| Corp. & Business Transactions | % | IP - Copyright | % | Real Estate/Title Agent - Com. | % |
| Criminal | % | International Law | % | Securities Law | % |
| Employment Law - Defense | % | Labor - Mgmt. Representation | % | Taxation - Opinions | % |
| Employment Law - Plaintiff | % | Labor - Labor Representation | % | Taxation - Other | % |
| Entertainment/Sports | % | Com. and Business Lit. - Def. | % | Work Comp. - Def. | % |
| Environmental Law | % | Com. and Business Lit. - Pltf. | % | Work Comp. - Pltf. | % |
| Estate/Probate/Trust | % | Mediation Arbitration | % | Other | % |
| Family Law | % | Mergers & Acquisitions | % | Total (must equal 100%) | |

Operations Information

- How many suits to collect unpaid fees have you filed against your clients during the last year?: _____
- Do you have a docket system with at least two independent date controls? Yes No
- Is one of the docket systems computerized? Yes No
- Does your firm use the following letters for all clients?:
 Engagement Letters Non-engagement letters Disengagement Letters Changes in scope of engagement
- Which of the following conflict avoidance systems do you maintain? Check all that apply:
 None Computer Index File Conflict Committee Memory
- Have there been any Professional Liability claims reported against the firm or any past or present attorneys in the past five years or are you aware of any circumstances that may give rise to a claim? If yes please provide details: Yes No
- Has any action been taken against any lawyer in the firm for disbarment, suspension, reprimand, or other disciplinary action in the past five years or is any grievance complaint pending? If yes please provide details: Yes No
- Are there any wholly owned entities you would like us to consider for coverage?
 None Mediation/Arbitration Title Agency Other, please specify: _____
- Are you a solo practitioner who only works part time (less than 25 hours/week) at applicant law firm? Yes No
 B. What is the average weekly number of hours spent in primary employment? (If applicant works full time for another law firm, please provide details on a separate page.)
- Does any client or group of clients make up 10% or more of the firms gross receipts? Yes No (If yes please complete Outside Interest Supplement.)
- Has any member of the firm been involved in class action or mass tort litigation? Yes No

Return to: Ben.Holloway@usiaffinity.com

Completed by (print):

Return fax: 610.362.8543

Signature: