

**TAX PREPARATION – BOOKKEEPING
SUPPLEMENTAL APPLICATION**

- 1) Does the applicant employ or use Certified Public Accountants in the performance of services for clients? () YES () NO

If YES, provide details. _____

- 2) Does the applicant provide legal advice, render opinions or otherwise interpret tax laws or rulings or accounting rules, standards or principles? () YES () NO

If YES, attach a description of such activity.

- 3) Does the applicant supervise or manage any investment or trust funds on behalf of clients? () YES () NO

If YES, attach a description of such activity.

- 4) Attach a description of the training period provided or required of employees.

- 5) Indicate the percentage of estimated gross receipts derived from each of the following:

- a) Tax Returns – Individuals _____%
- b) Tax Returns – Businesses _____%
- c) Bookkeeping – Individuals _____%
- d) Bookkeeping – Businesses _____%

It is understood and agreed that this supplemental application shall become a part of the application for Professional Liability Errors & Omissions Insurance.

Date

Name of Applicant

Signature of person authorized
to execute on behalf of the Applicant

WORLD-WIDE WEB ADDRESS