



ACCOUNTANTS PROFESSIONAL LIABILITY INSURANCE
COVERAGE APPLICATION FORM
"CLAIMS-MADE" POLICY

TAX SHELTERS SUPPLEMENTAL APPLICATION FORM

- 1. For all taxation work undertaken by the Applicant over the last five (5) years, please indicate what percentage of gross revenues were derived from opinions on tax shelters: \_\_\_\_\_ %
2. Please provide a narrative description of the services provided: \_\_\_\_\_

Multiple horizontal lines for providing a narrative description of services provided.

- 3. During the past five (5) years has the Internal Revenue Service challenged any transactions of the Applicant's clients described above, where the Applicant participated in, or opined on, the transaction?
[ ] Yes [ ] No

If Yes, on a separate sheet of paper, please describe the nature of the IRS's challenge on each transaction as well as the ultimate disposition of the matter.

- 4. During the past five (5) years has the Applicant been the subject of any other federal, state, or local government proceeding regarding the transactions described above? [ ] Yes [ ] No

If Yes, please describe any such proceeding and its ultimate disposition on a separate sheet of paper.