



**LAWYERS PROFESSIONAL LIABILITY
REAL ESTATE SUPPLEMENT**

Full Name of Applicant Firm: _____

1. Please enter the approximate percentage of gross firm billings for each of the following that describes your real estate practice for the last 12 months. **The total must equal 100%.**

a.	Residential Title searches, rendering of title opinions and other title work	_____ %
b.	Commercial Title searches, rendering of title opinions and other title work	_____ %
c.	Residential Closings – representation of borrowers/buyers	_____ %
d.	Commercial Closings – representation of borrowers/buyers	_____ %
e.	Residential Closings – representation of lenders	_____ %
f.	Commercial Closings – representation of lenders	_____ %
g.	Residential Closings – representation of sellers	_____ %
h.	Commercial Closings – representation of sellers	_____ %
i.	Residential Land Use, Zoning	_____ %
j.	Commercial Land Use, Zoning	_____ %
k.	Eminent Domain	_____ %
l.	Environmental	_____ %
m.	Escrow Agent	_____ %
n.	Financing – representation of borrowers	_____ %
o.	Financing – representation of lenders	_____ %
p.	Foreclosures – representation of borrowers	_____ %
q.	Foreclosures – representation of lenders	_____ %
r.	Landlord/Tenant	_____ %
s.	Litigation	_____ %
t.	Loan Workouts/Restructuring	_____ %
u.	Property Tax Abatements	_____ %
v.	Property Valuation Services	_____ %
w.	Short Sales	_____ %
x.	Tax Exempt Financing	_____ %
y.	1031 Property Exchanges	_____ %
z.	Other (Please specify) _____	_____ %

2. Please complete the following for transactions during the last 12 months:

During the last 12 months	Residential	Commercial
a. Number of transactions:	_____	_____
b. Average size/value per transaction:	_____	_____
c. Largest size/value transaction:	_____	_____
d. Number of title searches:	_____	_____
e. Number of title opinions:	_____	_____

3. Does the firm act in a dual capacity in the same real estate transaction?
If yes, is a disclosure form signed by all parties always used? Yes No
4. Does the firm arrange financing for commercial or municipal clients?
If yes, please provide a description on firm letterhead, including a list of the five largest transactions and the amount financed for each. Yes No
5. Does the firm form, manage or organize group investments such as syndications, general partnerships, limited partnerships, real estate investment trusts or corporations for purposes of investing in real estate?
If yes, please provide a description on firm letterhead. Yes No
6. Has anyone in the firm solicited or sought investors in real estate mortgages or real estate investments?
If yes, please provide a description on firm letterhead. Yes No
7. With respect to title searches indicated above, does the firm utilize the services of outside entities?
If yes, please provide proof insurance from the subcontracted sources. Yes No

8. Do you make use of engagement letters when doing title opinions or title searches, specifying who your client is and what services you are performing for that client? Yes No
If no, please explain on firm letterhead.
9. Does the firm or any member of the firm have an interest in a Title Agency? Yes No
If yes, please provide proof of insurance coverage.
10. Does the firm request coverage for a Title Agency? Yes No
NOTE: Coverage is available only for entities which are wholly owned by the firm.
If yes, please complete a Title Agency Supplement.
11. Does any firm member act as a title agent? Yes No
If yes, please answer the following:
a. What is the total number of insurance policies issued in the past 12 months? _____
b. What is the total commission income from all title policies issued in the past 12 months? _____
c. Is any firm member aware of any demand, claim or suit made in the past five years under a title insurance policy issued by the firm? Yes No
If yes, please complete a claim supplement for all such claims.
12. a. Does the firm hold client funds in escrow? Yes No
b. If yes to 12.a, are wire transfer instructions always verified by phone contact with the client or bank? Yes No
c. If yes to 12.a, are wire transfer instructions always sent by encrypted email or fax? Yes No
d. If yes to 12.a, does the firm have a crime policy or bond? Yes No
If yes to a, please provide a description on firm letterhead. If yes to d, please provide coverage limit.
13. Does the firm refer clients to other firms or entities regarding real estate matters? Yes No
If yes, please provide a narrative including detail regarding referral compensation.
14. With regard to your real estate clients, does the firm or any member of the firm:
a. Have a business relationship other than the rendering of legal services? Yes No
b. i) Have the authority to disburse funds for any of the real estate clients? Yes No
ii) If yes, are wire transfer instructions always verified by phone contact with the client or bank? Yes No
iii) If yes, are wire transfer instructions always sent by encrypted email or fax? Yes No
c. Accept a percentage of the dollar value of a transaction in lieu of legal fees? Yes No
d. Provide services to clients involved in subprime lending or loans to subprime borrowers? Yes No
If yes, please provide a description on firm letterhead.
15. Does any member of the firm offer advice or issue opinions on any matters related to zoning or environmental issues? Yes No
If yes, please provide a description on firm letterhead.
16. Does any firm member offer advice or issue opinions on any matters related to oil, gas, or mineral rights? Yes No
If yes, please complete an Oil & Gas Supplement.
17. Does the firm's legal services in connection with a property transfer or leasing transaction include documented procedures to review and address issues such as :
a. Whether the type of business in question creates, may have created or otherwise involves environmental issues and concerns? Yes No
b. Whether any real or personal property owned or leased now, or property to be procured is or is likely to be contaminated by hazardous matters (e.g., asbestos, lead, etc.)? Yes No
If you answered "yes" to a or b please complete an Environmental Supplement.

Signature of Officer or Partner

Date

Print Name of Officer or Partner