



**THE CPA ADVANTAGE™
ACCOUNTANTS PROFESSIONAL LIABILITY INSURANCE
APPLICATION
PUBLIC & PRIVATE OFFERINGS SUPPLEMENT**



- ◆ Please type or print clearly.
- ◆ All questions must be answered completely.
- ◆ Please DO NOT use pencil.
- ◆ Supplement must be signed by principal of the firm.

Applicant or Firm Name _____

1. Please provide information for each offering of securities, real estate or other investments within the past 3 years, including non-regulated offerings.

Client Name and Industry	Type of Services Rendered by Your	Date of services performed	Size of Offering	Fees Charged	* Type of Offering
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	

* If public, indicate primary or secondary. If private, indicate partnership, trust or stock sale.

2. Specify the years of experience of firm personnel involved in the offering of securities, real estate, or other investments described above:

3. On how many offerings during the last three years for which the firm provided accounting services, was the firm acting in more than one capacity? Number of Offerings: _____

Explanation:

_____ Date Signed ____/____/____

Signature of Owner, Officer or Partner