

# TAX PREPARERS / BOOKKEEPERS SUPPLEMENT



1. a. Please provide a percentage breakdown based upon gross revenue for the past twelve (12) months of the following types of work performed. If Firm is newly established, please advise best estimate. Percentages must total 100% in each section.

Areas of Practice	% of Gross Revenue	Areas of Practice	% of Gross Revenue
Bookkeeping/Writeups	%	Audit - Municipal	%
Review	%	Audit - Publicly Held Companies	%
Compilation	%	Audit - Other	%
Personal Tax Returns	%	Securities Work	%
Corporate Tax Returns	%	Business Acquisitions	%
Estate Tax Returns	%	Management Advisory Services	%
Financial Planning	%	Other (Describe):	XXXXXXXX
EDP/Computer Services	%		%

- b. Further define the types of work you perform by the type of client.

Type of Client	% of Gross Revenue	Type of Client	% of Gross Revenue
Individuals	%	Financial Institutions	%
Healthcare/HMO's	%	Publicly Held Companies	%
Construction	%	Non-Profit Organizations	%
Privately Held Companies	%	Other (Describe):	XXXXXXXX
Real Estate	%		%

2. In the past five (5) years, has the Firm or any current or former member of the Firm provided professional services:

- a. to a publicly traded client? -----  Yes  No  
 b. in connection with the registration, sale or offering of securities for clients? -----  Yes  No  
 c. in connection with the offer and sale of private placement bonds? -----  Yes  No

If "Yes", please provide details.

## NOTICE

Applicant understands the information submitted herein becomes a part of the Applicant's Professional Liability Insurance Application or Renewal Application and is subject to the same representations and conditions.

Must be signed and dated by a principal, partner or owner as duly authorized on behalf of the Applicant.

Signature of Principal, Partner or Owner

Title

Date