



ESTATE EXECUTOR/ADMINISTRATOR SUPPLEMENTAL APPLICATION



- 1. What type of estate is being administered? _____
- 2. What is the value of the estate assets? \$ _____
- 3. Is there any commingling of the estate funds with any other funds? Yes No
- 4. Is the estate executor/administrator a beneficiary? Yes No
- 5. Does the executor/administrator have discretionary authority in the investment of the trust's funds? Yes No
If Yes, please attach full details.
- 6. Is an independent Investment Counselor/Advisor used? Yes No
- 7. Is an independent Certified Public Account used to prepare and file the estate's financial statements and tax forms? Yes No

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

THE APPLICATION MUST BE SIGNED AND DATED BY AN OWNER, OFFICER OR PARTNER.

Applicant Signature: _____ Date (Mo-Day-Yr): _____

Name and Title (Please Print): _____