

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

ACCOUNT: \_\_\_\_\_

POLICY #: \_\_\_\_\_

**Please make checks payable to: American Professional Agency,**

Dear Client:

This form will be replacing your renewal application. Please provide us with any changes that need to be made to your coverage and complete the required questions below. Sign and date this form and return it to us with your premium payment. If you have any questions, please call us at 1-800-421- 6694. **Failure to return the required items before the renewal date will cause this policy to lapse.** If the bank returns your premium payment for uncollected funds, we will redeposit your payment, if possible. In instances where we must return your check to you, we will be assessing you a \$20 service charge.

**THIS SECTION MUST BE COMPLETED BY YOU**

**Please answer the following questions.**


1. At this time, do you or anyone listed on your policy have a pending claim, new claim, potential claim or licensing board complaint, or recently been found guilty of an ethics violation or professional misconduct, or been convicted of a crime? (YES)\_\_\_\_ (NO)\_\_\_\_  
If yes, please send complete details along with any pertinent papers regarding the situation. **Since your last renewal if a board complaint has been adjudicated, you must send us all documentation regarding the outcome.**
2. Is any person covered under this policy engaged in or ever been engaged in any sexual misconduct with any of your current or former patients or any current or former patient’s spouse or any person with a direct relationship to the patient or former patient (for example a guardian, blood relative of the patient or spouse or any person sharing the patient’s domicile)? (YES)\_\_\_\_ (NO)\_\_\_\_
3. **Please check if you are receiving the exclusively employed rate:** ( ) I understand that if I apply and qualify for the exclusively employed rate, the policy will exclude coverage for private practice, volunteering and independent contractual services.
4. Date of Birth:\_\_\_\_/\_\_\_\_/\_\_\_\_

**TO BE COMPLETED IF YOU HAVE ANY CHANGES** ( ) **There are no changes to my current coverage.**

1. Name: \_\_\_\_\_
2. Address: \_\_\_\_\_
3. E-mail address: \_\_\_\_\_ Phone #: \_\_\_\_\_
4. (a) Limits of Liability: \_\_\_\_\_ (b) Defense Reimbursement Limits: \_\_\_\_\_
5. Staff changes (staff listing must be included): If there has been any change in your staff (employees or independent contractors), using a separate piece of paper, please provide us with the names, degrees, fields of study, license (state & title) of all your staff and whether they are W2 employees or 1099 contractors. *(Please refer to the chart on reverse side to calculate premium due.)*
6. Credential changes: If you or any of your staff’s credentials have changed (i.e. MSW to Ph.D.), please advise us.
7. Change to: ( ) Exclusively Employed ( ) Full-time ( ) Part-time The part-time discounted rate is available if your total working hours in **ALL** positions including W2 employment and volunteering does not exceed 20 hours. You **DO NOT** qualify, if you are incorporated, in a partnership, in a LLC, with any W2 form employees or if you use the services of more than 3 independent contractors. **Total number of hours per week** \_\_\_\_\_.
8. Type of Coverage \_\_\_\_\_.

**NOTE:** A new application will need to be completed if you are changing the Type of Coverage on your policy (i.e. from an individual to a corporation). An application is available by calling our office at 1-800-421-6694 or downloading one from our website at [www.americanprofessional.com](http://www.americanprofessional.com). These situations may be considered a new submission; therefore, a completed application is required

Date \_\_\_\_\_ Signature \_\_\_\_\_

Signature and Payment Required 

**PAYMENT OPTIONS:** You now have two options for paying for the renewal coverage:

- 1- Mail the bottom portion of this statement along with a check made payable to **AMERICAN PROFESSIONAL AGENCY, INC.**  
(Please write your account number on the check)

**Please provide your Email Address:**

- or -
- 2- Renew online by credit card at  
<http://www.americanprofessional.com/socialwork/>

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