

Kaestner & Berry

Professional Insurance Services, LLC _____

Firm Name: _____ **Contact Person** _____
Address: _____ **City** _____ **State** _____ **Zip** _____
Contact Email _____ **Phone** _____ **Fax** _____

Date Firm Established _____ Firm's estimated annual gross income? _____ # of Attys in Firm _____

Docket Type: _____ Computer _____ Tickler _____ 2 Calendars _____ Other _____
Is docket maintained by at least 2 people _____ Number of suits for fees filed in past 2 yrs: # _____

Conflict Type: _____ Computer _____ Single Index _____ Dual Index _____ Oral/Memory _____ Other _____
Do you use:

Engagement Letters ___Yes ___No Fee Agreements ___Yes ___No Declination Letters ___Yes ___No

- Has any member of the firm been disbarred, reprimanded, suspended or had license revoked?
____Yes ____No. If yes, please explain
- Over the last 7 yrs, has any member or former member of the firm been the subject of a malpractice claim filed against them or reported an incident or circumstance to a malpractice carrier?
____Yes ____No If yes, please provide details

Firm Area of Practice

- | | |
|---|--|
| _____ % Administrative | _____ % Legal Malpractice Defense |
| _____ % Banking/Financial Institutions | _____ % Legal Malpractice Plaintiff |
| _____ % Bankruptcy | _____ % Mediation/Arbitration |
| _____ % Civil Rights Plaintiff | _____ % Medical Malpractice Defense |
| _____ % Class Action Defense | _____ % Medical Malpractice Plaintiff |
| _____ % Class Action Plaintiff | _____ % Municipal/Local Government |
| _____ % Collection | _____ % Oil Gas and Mining |
| _____ % Commercial & Corp General Lit. Defense | _____ % Personal Injury/Bodily Injury Defense |
| _____ % Commercial & Corp General Lit. Plaintiff | _____ % Personal Injury/Bodily Injury Plaintiff |
| _____ % Construction Law | _____ % Product Liability Defense |
| _____ % Corporate Formation | _____ % Product Liability Plaintiff |
| _____ % Corp. Mergers/Acquisitions | _____ % Real Estate Residential |
| _____ % Criminal | _____ % Real Estate Commercial |
| _____ % Entertainment | _____ % School Law |
| _____ % Environmental | _____ % SEC/State Securities |
| _____ % ERISA or Employee Benefits | _____ % Social Security |
| _____ % Estate Planning | _____ % Taxation Corporate |
| _____ % Estate Probate Trust | _____ % Taxation Individual |
| _____ % Family Law | _____ % Traffic |
| _____ % General Corporate Business | _____ % Workers' Compensation Defense |
| _____ % Immigration Law | _____ % Workers' Compensation Plaintiff |
| _____ <u>Intellectual Property</u> | _____ % Other Please explain |
| _____ % Copyright/Trademark | _____ |
| _____ % Patent | _____ |
| _____ % Labor Management Representation | _____ |
| _____ % Labor Union Representation | 100% Total |

Current Insurance Information: Name of Current Carrier _____
Expiring Limits _____ Deductible _____ Expiring Premium _____
Date of first continuous claims-made coverage: _____ Limits being requested _____
Signature _____ Date: _____