

For independent and consulting analytical chemists, including method development, analysis, formulation consulting, regulatory data, and expert testimony. Complete with ACORD 125. Attach a description of services, a sample client contract or engagement letter, resumes or credentials of key professionals, and five years of loss runs.

1 APPLICANT / BUSINESS INFORMATION

LEGAL BUSINESS NAME	DBA	FEIN	YEARS IN BUSINESS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BUSINESS ADDRESS	CITY / STATE / ZIP	WEBSITE	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Entity type:
☐ Sole proprietor ☐ Partnership ☐ LLC ☐ Corporation ☐ Nonprofit

PRIMARY CONTACT / TITLE	PHONE	EMAIL
<input type="text"/>	<input type="text"/>	<input type="text"/>

LICENSES / CERTIFICATIONS HELD	PROFESSIONAL STAFF / TOTAL EMPLOYEES
<input type="text"/>	<input type="text"/>

2 OPERATIONS

Services provided (check all that apply):
☐ Method development / validation ☐ Analytical testing ☐ Formulation consulting ☐ Impurity / stability studies ☐ Regulatory data packages
☐ Forensic chemistry ☐ Failure / contamination analysis ☐ Expert testimony

LAB / CONSULTING / TESTIMONY SPLIT (%)	INDUSTRIES SERVED	OWN LAB OR SUBCONTRACTED
<input type="text"/>	<input type="text"/>	<input type="text"/>
LARGEST CLIENT (% OF REVENUE)	WORK OUTSIDE YOUR HOME STATE (%)	WORK SUBCONTRACTED (%)
<input type="text"/>	<input type="text"/>	<input type="text"/>

2-1 Is every engagement under a signed written contract or engagement letter? ☐ Yes ☐ No
 IF NO, EXPLAIN

2-2 Do contracts limit your liability (e.g., to fees paid)? ☐ Yes ☐ No
 IF NO, EXPLAIN

3 EXPOSURE & RISK QUESTIONS — METHOD VALIDATION & ANALYTICAL RIGOR

An analyst who hid QC failures nine times to raise his productivity was federally convicted of wire fraud in 2021.

3-1 Is method validation documented before results are reported? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-2 Is subcontracted analysis sent only to labs accredited for that method? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-3 Is each report peer-reviewed by a second qualified chemist? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-4 Is raw instrument data kept for at least 7 years? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-5 Are calibrations traceable to certified reference materials? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-6 Do reports state measurement uncertainty? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-7 Has a client alleged that an analytical error caused a product recall? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-8 Does formulation work you advise on end up in commercial products? ☐ Yes ☐ No
IF YES, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — EXPERT TESTIMONY & REGULATORY WORK

Since December 2023, Rule 702 requires every expert opinion to rest on sufficient data and reliable application of method — an excluded opinion can trigger a claim from the client who hired you.

4-1 Do you provide expert-witness testimony? ☐ Yes ☐ No
IF YES, EXPLAIN

4-2 Has a court excluded or limited your testimony? ☐ Yes ☐ No
IF YES, EXPLAIN

4-3 Is a conflict check run before each litigation engagement? ☐ Yes ☐ No
IF NO, EXPLAIN

4-4 Do retention agreements state fees are not contingent on outcome? ☐ Yes ☐ No
IF NO, EXPLAIN

4-5 Do you sign regulatory submissions on a client's behalf? ☐ Yes ☐ No
IF YES, EXPLAIN

4-6 Is a file kept documenting the data relied on for each opinion? ☐ Yes ☐ No
IF NO, EXPLAIN

4-7 Do you hold a professional certification (e.g., AIC Certified Professional Chemist)? ☐ Yes ☐ No
IF NO, EXPLAIN

4-8 Have you received a subpoena related to your work product? ☐ Yes ☐ No
IF YES, EXPLAIN

5 PAYROLL, SALES & REVENUE

ANNUAL REVENUE (\$)	LARGEST SINGLE CONTRACT (\$)	SUBCONTRACTOR COSTS (\$)	TOTAL ANNUAL PAYROLL (\$)

6 PRIOR INSURANCE & LOSS HISTORY

CURRENT E&O CARRIER / LIMITS	DEDUCTIBLE / RETROACTIVE DATE	EXPIRATION DATE

DATE OF CLAIM	DESCRIPTION	TOTAL INCURRED (\$)	OPEN / CLOSED

6-1 Has a claim alleged an analytical or interpretation error? ☐ Yes ☐ No
IF YES, EXPLAIN

6-2 Has a client refused to pay or sued over fees in the past 5 years? ☐ Yes ☐ No
IF YES, EXPLAIN

6-3 Has any license, certification, or registration been suspended, disciplined, or investigated? ☐ Yes ☐ No
IF YES, EXPLAIN

6-4 Has any coverage been declined, cancelled, or non-renewed? ☐ Yes ☐ No
IF YES, EXPLAIN

6-5 Is the applicant aware of any incident or circumstance that could give rise to a claim? ☐ Yes ☐ No
IF YES, EXPLAIN

7 RISK MANAGEMENT & SAFETY

7-1	Are client files and work papers retained for a set period under a written policy?	☐ Yes ☐ No
IF NO, EXPLAIN		
7-2	Is multifactor authentication required for email and client data?	☐ Yes ☐ No
IF NO, EXPLAIN		
7-3	Are reagents and hazardous chemicals stored per SDS requirements?	☐ Yes ☐ No
IF NO, EXPLAIN		
7-4	Are client formulations kept on encrypted systems?	☐ Yes ☐ No
IF NO, EXPLAIN		

8 SIGNATURE & FRAUD WARNING

The undersigned declares that the statements and answers given in this supplemental are true, complete and correct to the best of their knowledge, and that no material fact has been withheld or misstated. The applicant agrees that this supplemental, together with all ACORD applications and attachments, forms the basis of any submission to insurers and may be relied upon by them. Signing this supplemental does not bind coverage. This supplemental is an intake document prepared by Cory Washington & Co. LLC to support carrier submission; it does not itself provide coverage.

FRAUD NOTICE: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance containing any materially false information, or conceals for the purpose of misleading information concerning any fact material thereto, may be committing a fraudulent insurance act, which is a crime and may subject such person to criminal and civil penalties. State-specific fraud warnings appear on the insurer's application.

APPLICANT / AUTHORIZED SIGNATURE (TYPE FULL NAME)	TITLE	DATE
PRODUCER — CORY WASHINGTON & CO. LLC	PRODUCER SIGNATURE (TYPE FULL NAME)	DATE