

For independent audio/visual consultants who design, specify, and commission AV systems without selling or installing equipment. 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):
☐ AV system design ☐ Specifications / bid documents ☐ Acoustics consulting ☐ Construction administration ☐ Commissioning
☐ Control system design ☐ AV-over-IP / network design ☐ Assistive listening design ☐ Owner's representative

DESIGN / CA / COMMISSIONING SPLIT (%)	LARGEST PROJECT VALUE (\$)	CERTIFICATIONS (CTS-D, PE, RCDD)
<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 Do you sell equipment or lead design-build projects? ☐ Yes ☐ No
IF YES, EXPLAIN

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

2-3 Do contracts limit your liability (e.g., to fees paid)? ☐ Yes ☐ No
IF NO, EXPLAIN

3 EXPOSURE & RISK QUESTIONS — DESIGN SCOPE, SPECIFICATIONS & CODE

A mis-specified control system that delays a stadium opening is the textbook AV consultant claim; assembly spaces must also meet ADA assistive listening receiver counts.

3-1 Does your contract exclude installation means and methods? ☐ Yes ☐ No
IF NO, EXPLAIN

3-2 Does a second qualified designer review drawings before bid? ☐ Yes ☐ No
IF NO, EXPLAIN

3-3 Is every assembly space checked against ADA assistive listening requirements? ☐ Yes ☐ No
IF NO, EXPLAIN

3-4 Do you specify systems tied into fire alarm or voice evacuation? ☐ Yes ☐ No
IF YES, EXPLAIN

3-5 Is specified equipment confirmed available at the time of bid? ☐ Yes ☐ No
IF NO, EXPLAIN

3-6 Does any project exceed \$5 million in contract value? ☐ Yes ☐ No
IF YES, EXPLAIN

3-7 Is a design-responsibility matrix used on every project? ☐ Yes ☐ No
IF NO, EXPLAIN

3-8 Are design files kept under version control for at least 10 years? ☐ Yes ☐ No
IF NO, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — CONSTRUCTION ADMINISTRATION & COMMISSIONING

Design-bid drawings are often marked "for bid reference only" while the integrator produces shop drawings, which blurs who is responsible when a system underperforms.

4-1 Are all integrator submittal reviews logged in writing? ☐ Yes ☐ No
IF NO, EXPLAIN

4-2 Is final commissioning done against written performance criteria? ☐ Yes ☐ No
IF NO, EXPLAIN

4-3 Must integrators carry their own E&O? ☐ Yes ☐ No
IF NO, EXPLAIN

4-4 Must integrators name you as additional insured on their GL? ☐ Yes ☐ No
IF NO, EXPLAIN

4-5 Are manufacturer rebates or referral fees disclosed to clients? ☐ Yes ☐ No
IF NO, EXPLAIN

4-6 Do you design network security for AV-over-IP systems? ☐ Yes ☐ No
IF YES, EXPLAIN

4-7 Has an owner claimed a project delay caused by your design? ☐ Yes ☐ No
IF YES, EXPLAIN

4-8 Do staff wear site safety gear during construction visits? ☐ Yes ☐ No
IF NO, EXPLAIN

5 PAYROLL, SALES & REVENUE

ANNUAL REVENUE (\$)	LARGEST SINGLE CONTRACT (\$)	SUBCONTRACTOR COSTS (\$)	TOTAL ANNUAL PAYROLL (\$)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6 PRIOR INSURANCE & LOSS HISTORY

CURRENT E&O CARRIER / LIMITS	DEDUCTIBLE / RETROACTIVE DATE	EXPIRATION DATE
<input type="text"/>	<input type="text"/>	<input type="text"/>

DATE OF CLAIM	DESCRIPTION	TOTAL INCURRED (\$)	OPEN / CLOSED
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6-1 Has a claim alleged a design or specification 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 owner contracts reviewed for indemnity terms before signing?

☐ Yes ☐ No

IF NO, EXPLAIN

7-4 Is test equipment calibrated on a schedule?

☐ 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
<div></div>	<div></div>	<div></div>
PRODUCER — CORY WASHINGTON & CO. LLC	PRODUCER SIGNATURE (TYPE FULL NAME)	DATE
<div></div>	<div></div>	<div></div>