

Covers executive, leadership, business, career, and team coaches and coaching firms — one-on-one, group, and corporate programs — including those who facilitate workshops, deliver assessments, or sell online courses and masterminds. Complete with ACORD 125. Attach a sample client agreement, marketing materials, and a list of assessment tools used.

1 APPLICANT / BUSINESS INFORMATION

LEGAL BUSINESS NAME	DBA	FEIN	YEARS IN BUSINESS
OFFICE ADDRESS	CITY / STATE / ZIP	WEBSITE	

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

PRIMARY CONTACT / TITLE	PHONE	EMAIL

COACHING CREDENTIALS (ICF, EMCC, OTHER)	OTHER LICENSES HELD (CPA, ATTORNEY, THERAPIST, ETC.)

2 OPERATIONS

DESCRIPTION OF THE PRACTICE (COACHING FOCUS, CLIENTS, DELIVERY METHODS)

SERVICE	% OF REVENUE

Services: executive / leadership coaching; business owner coaching; career & transition coaching; team coaching & facilitation; workshops & keynotes; assessments (DISC, Hogan, 360s); online courses & memberships; masterminds & retreats; consulting or interim management.

Clients (check all):

- ☐ Individuals paying themselves
 ☐ Employer-sponsored executives
 ☐ Small business owners
 ☐ Large corporations
 ☐ Nonprofits / government
☐ Clients outside the U.S.

Size and volume:

Coaches (incl. owner)
 Contract coaches
 Active clients
 Group program participants
 Retreats per year

3 EXPOSURE & RISK QUESTIONS — ADVICE, SCOPE & PROMISES

Clients may claim a coach's advice caused financial or emotional harm. Coaches who drift into therapy, legal, or financial advice can face claims their coverage was never written for.

3-1 Does the applicant advise on specific business decisions (hiring, firing, pricing, investments, deals)?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-2 Do marketing or sales materials promise income, revenue, promotions, or other specific results?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-3 Does the applicant work with clients on mental health, trauma, addiction, or relationship issues?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-4 Is there a written referral process for clients who need a therapist, attorney, or financial advisor?	☐ Yes ☐ No
IF YES, EXPLAIN	

- 3-5 Does every client sign an agreement defining scope, confidentiality, exclusions, and that coaching is not therapy or legal advice? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-6 Does the applicant administer psychometric assessments or 360 reviews, and are they licensed and certified? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-7 Does the applicant act as a consultant, board advisor, or interim executive for any client? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-8 Has a client demanded a refund, filed a complaint, or claimed harm from coaching in the last 5 years? ☐ Yes ☐ No
IF YES, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — CONFIDENTIALITY, PROGRAMS & EVENTS

- 4-1 When employers pay for coaching, is it agreed in writing what will and will not be shared with the employer? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-2 Are session notes, recordings, and assessment results stored securely and deleted on schedule? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-3 Does the applicant sell online courses, memberships, or high-ticket programs with payment plans? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-4 Does the applicant host retreats, events, or adventure-based or physical activities? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-5 Do contract coaches deliver services under the applicant's brand, and do they carry their own insurance? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-6 Does the applicant use client names, stories, or testimonials in marketing, with written consent? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-7 Do corporate client contracts require indemnity, specific insurance limits, or cyber coverage? ☐ Yes ☐ No
IF YES, EXPLAIN

5 PAYROLL, SALES & REVENUE

TOTAL ANNUAL PAYROLL (\$, ILLUSTRATIVE)	NUMBER OF EMPLOYEES	PAYMENTS TO CONTRACT COACHES (\$, ILLUSTRATIVE)
PROJECTED ANNUAL GROSS REVENUE (\$, ILLUSTRATIVE)	PRIOR YEAR REVENUE (\$, ILLUSTRATIVE)	LARGEST SINGLE CLIENT REVENUE (\$, ILLUSTRATIVE)

6 PRIOR INSURANCE & LOSS HISTORY

Attach currently-valued loss runs for the last 5 years.

CURRENT E&O CARRIER

E&O LIMIT / RETRO DATE

CURRENT GL CARRIER

6-1 Has any carrier declined, cancelled, or non-renewed coverage for this business in the last 5 years?

☐ Yes ☐ No

IF YES, EXPLAIN

6-2 Has a regulator, consumer agency, or payment processor acted on refund or marketing complaints?

☐ Yes ☐ No

IF YES, EXPLAIN

DATE OF LOSS	DESCRIPTION	TOTAL INCURRED (\$, ILLUSTRATIVE)	OPEN / CLOSED

6-3 Is the applicant aware of any incident, complaint, or circumstance not yet resulting in a claim that could reasonably give rise to one?

☐ Yes ☐ No

IF YES, EXPLAIN

7 RISK MANAGEMENT & SAFETY

7-1 Are client agreements reviewed by an attorney and updated at least every 2 years?

☐ Yes ☐ No

IF YES, EXPLAIN

7-2 Are marketing claims reviewed for FTC compliance, including earnings and testimonial rules?

☐ Yes ☐ No

IF YES, EXPLAIN

7-3 Does the applicant follow a professional code of ethics (e.g., ICF) and take continuing education?

☐ Yes ☐ No

IF YES, 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, commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties. (State-specific fraud warnings apply; see state amendatory notice.)

APPLICANT / AUTHORIZED SIGNATURE (TYPE FULL NAME)

TITLE

DATE

PRODUCER — CORY WASHINGTON & CO. LLC

PRODUCER SIGNATURE (TYPE FULL NAME)

DATE