

For independent expert witnesses and expert firms retained to consult and testify in litigation and arbitration. 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):

☐ Consulting (non-testifying) expert	☐ Testifying expert	☐ Court-appointed neutral expert	☐ Damages / economic analysis
☐ Medical / clinical opinions	☐ Engineering / technical opinions	☐ Site or product inspections	☐ Arbitration testimony

CASES TESTIFIED IN PER YEAR	DEPOSITION VS. TRIAL SPLIT (%)	AVERAGE AMOUNT IN CONTROVERSY (\$)
<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 testify outside the United States? ☐ 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 — ENGAGEMENT & TESTIMONY PRACTICES

In *LLMD of Michigan v. Jackson-Cross*, a damages expert was held liable for a math error that badly understated lost profits. Since December 2023, federal Rule 702 requires proof that an opinion reliably applies its method to the facts.

3-1 Does every engagement letter define the scope of your opinions?	☐ Yes ☐ No
IF NO, EXPLAIN <input type="text"/>	
3-2 Do you run a conflict check before accepting each retention?	☐ Yes ☐ No
IF NO, EXPLAIN <input type="text"/>	
3-3 Is every report checked independently for calculation errors before it is served?	☐ Yes ☐ No
IF NO, EXPLAIN <input type="text"/>	
3-4 Do you decline engagements outside your licensed discipline?	☐ Yes ☐ No
IF NO, EXPLAIN <input type="text"/>	
3-5 Do you keep a log of every Daubert or Rule 702 challenge to your testimony?	☐ Yes ☐ No
IF NO, EXPLAIN <input type="text"/>	
3-6 Has a court ever excluded or limited your testimony?	☐ Yes ☐ No
IF YES, EXPLAIN <input type="text"/>	

3-7 Do you keep working files at least through the end of all appeals? ☐ Yes ☐ No
IF NO, EXPLAIN

3-8 Do you avoid contingency-based fee arrangements? ☐ Yes ☐ No
IF NO, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — CLAIMS, DISCIPLINE & JURISDICTION

Six U.S. states let clients sue their own expert, and the UK Supreme Court ended expert immunity in 2011. Licensing boards can also review testimony.

4-1 Has a retaining party ever sued you or made a demand against you? ☐ Yes ☐ No
IF YES, EXPLAIN

4-2 Has a licensing board or professional society ever reviewed your testimony? ☐ Yes ☐ No
IF YES, EXPLAIN

4-3 Do you testify in California, Connecticut, Louisiana, Massachusetts, Missouri, or Pennsylvania? ☐ Yes ☐ No
IF YES, EXPLAIN

4-4 Do you accept court-appointed neutral expert roles? ☐ Yes ☐ No
IF YES, EXPLAIN

4-5 Do you hold an active license in your testifying discipline? ☐ Yes ☐ No
IF NO, EXPLAIN

4-6 Is your CV reviewed for accuracy before each engagement? ☐ Yes ☐ No
IF NO, EXPLAIN

4-7 Do you publish articles or speak publicly about cases? ☐ Yes ☐ No
IF YES, EXPLAIN

4-8 Do you inspect sites or products in person? ☐ Yes ☐ No
IF YES, 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 an error in your opinion, report, or testimony? ☐ 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 draft reports reviewed by a second qualified person?

☐ Yes ☐ No

IF NO, EXPLAIN

7-4 Do you document all communications with retaining counsel?

☐ 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