For market research firms running online panels, phone and SMS surveys, focus groups, and analytics for clients. 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

BUSINESS ADDRESS | CITY / STATE / ZIP | WEBSITE

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

PRIMARY CONTACT / TITLE | PHONE | EMAIL

LICENSES / CERTIFICATIONS HELD | PROFESSIONAL STAFF / TOTAL EMPLOYEES

2 OPERATIONS

Services provided (check all that apply):
☐ Online panel surveys ☐ Phone (CATI) surveys ☐ SMS / text surveys ☐ Focus groups ☐ In-depth interviews
☐ Ethnography / in-home ☐ Healthcare research ☐ Data analytics / modeling ☐ Mystery shopping

COMPLETES PER YEAR | PANEL SIZE | SAMPLE BOUGHT FROM THIRD PARTIES (%) | ANNUAL INCENTIVES PAID ($)

LARGEST CLIENT (% OF REVENUE) | WORK OUTSIDE YOUR HOME STATE (%) | WORK SUBCONTRACTED (%)

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 — DATA INTEGRITY & DELIVERABLES

Prosecutors allege two panel companies billed clients $10M for fabricated responses from coached fake respondents using VPNs.

3-1 Are fraud-detection tools used on online samples (IP, VPN, device checks)? ☐ Yes ☐ No
IF NO, EXPLAIN

3-2 Are third-party sample suppliers vetted before use? ☐ Yes ☐ No
IF NO, EXPLAIN

3-3 Do supplier contracts include data-quality warranties? ☐ Yes ☐ No
IF NO, EXPLAIN

3-4 Does every survey include attention checks? ☐ Yes ☐ No
IF NO, EXPLAIN

3-5 Do reports state methodology limits and margin of error? ☐ Yes ☐ No
IF NO, EXPLAIN

3-6 Does a second analyst review findings before delivery? ☐ Yes ☐ No
IF NO, EXPLAIN

3-7 Are raw data and audit trails kept for at least 3 years? ☐ Yes ☐ No
IF NO, EXPLAIN

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3-8 Has a client disputed the quality of your data? ☐ Yes ☐ No
IF YES, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — CALLS, TEXTS, INCENTIVES & PRIVACY

Survey calls are not telemarketing under the TCPA (Hunsinger v. Dynata, 2023), but Gallup's $12M settlement shows autodialed calls to cell phones without consent still create class exposure.

4-1 Do you place survey calls or texts to cell phones? ☐ Yes ☐ No
IF YES, EXPLAIN

4-2 Is prior express consent obtained before autodialed calls to cell phones? ☐ Yes ☐ No
IF NO, EXPLAIN

4-3 Is sales content kept out of survey calls? ☐ Yes ☐ No
IF NO, EXPLAIN

4-4 Is an internal do-not-call list kept for respondents? ☐ Yes ☐ No
IF NO, EXPLAIN

4-5 Are incentive terms published in writing? ☐ Yes ☐ No
IF NO, EXPLAIN

4-6 Is consent obtained before recording focus groups? ☐ Yes ☐ No
IF NO, EXPLAIN

4-7 Do you conduct health studies? ☐ Yes ☐ No
IF YES, EXPLAIN

4-8 Is respondent data de-identified before delivery to clients? ☐ Yes ☐ No
IF NO, 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 flawed methods or faulty data? ☐ 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

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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 Is respondent data encrypted at rest? ☐ Yes ☐ No
IF NO, EXPLAIN

7-4 Are incentive payouts reconciled monthly? ☐ 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