

Covers owner's representatives and owner's project managers acting for owners, developers, institutions, and public agencies — managing designers and contractors, approving payments and changes, and reporting budget and schedule — without holding construction contracts. Complete with ACORD 125. Attach standard owner agreements, resumes of key staff, and a list of current engagements.

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 ☐ Other

PRIMARY CONTACT / TITLE	PHONE	EMAIL

LICENSED ARCHITECTS / ENGINEERS ON STAFF	STATES WHERE SERVICES ARE PROVIDED

2 OPERATIONS

DESCRIPTION OF SERVICES AND TYPICAL CLIENTS (OWNER TYPES, PROJECT TYPES, HOW ENGAGEMENTS ARE STRUCTURED)

Services provided (check all):

- ☐ Site selection and feasibility ☐ Budget and cost estimating ☐ Designer and contractor selection ☐ Contract negotiation
☐ Payment application review ☐ Change order review ☐ Schedule monitoring ☐ Move management / FF&E
☐ Owner's project manager (public) ☐ Claims and dispute support

CLIENT TYPE	% OF REVENUE

Client types: private developers; corporate real estate; healthcare systems; universities and schools; public agencies; nonprofits and churches; high-net-worth residential.

Volume:

Active engagements Construction value under management (\$) Largest single project (\$) Project managers

3 EXPOSURE & RISK QUESTIONS — AUTHORITY, APPROVALS & STANDARD OF CARE

A Louisiana court let a contractor sue the owner's agent for refusing payment applications, delaying submittals, and withholding substantial completion — even though the contractor had no contract with the agent.

3-1 Does every engagement have a written agreement defining scope, authority to bind the owner, and limits of liability? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-2 Can the firm approve payments, change orders, or contract amendments without the owner's sign-off? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-3 Does the firm certify or recommend substantial completion, final payment, or release of retainage? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-4	Does the firm provide services outside its written scope, such as engineering judgments or claims negotiation?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-5	Do staff without architecture or engineering licenses review design or give technical opinions?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-6	Does the firm hold or disburse project funds for the owner?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-7	Does the firm have any financial relationship with contractors, designers, or vendors it recommends?	☐ Yes ☐ No
IF YES, EXPLAIN		

4 EXPOSURE & RISK QUESTIONS — BUDGETS, SCHEDULES & DISPUTES

Massachusetts sued the Big Dig's management consultant for up to \$146 million plus fees, alleging it underestimated costs while earning bonuses for staying within budget.

4-1	Does the firm prepare budgets or cost estimates the owner uses to secure financing or approvals?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-2	Is any part of the firm's fee tied to staying within budget or schedule?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-3	Does the firm guarantee project cost, schedule, or outcome in any contract?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-4	Does the firm visit job sites and walk through active construction?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-5	Are written monthly reports on budget, schedule, and risks sent to the owner?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-6	Has an owner or contractor claimed that the firm caused delay, cost overruns, or lost financing?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-7	Does the firm act as an expert witness or prepare claims for owners in disputes?	☐ Yes ☐ No
IF YES, EXPLAIN		

5 PAYROLL, SALES & REVENUE

TOTAL ANNUAL PAYROLL (\$, ILLUSTRATIVE)	NUMBER OF EMPLOYEES	INDEPENDENT CONTRACTORS USED
ANNUAL FEE REVENUE (\$, ILLUSTRATIVE)	PRIOR YEAR REVENUE (\$, ILLUSTRATIVE)	LARGEST CLIENT (% OF REVENUE)

6 PRIOR INSURANCE & LOSS HISTORY

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

CURRENT PROFESSIONAL LIABILITY CARRIER	LIMIT / RETENTION	RETROACTIVE DATE

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 client withheld fees or terminated the firm over performance? ☐ Yes ☐ No
IF YES, EXPLAIN

DATE OF CLAIM	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

7-1 Are owner approvals documented in writing for every payment, change, and schedule decision? ☐ Yes ☐ No
IF YES, EXPLAIN

7-2 Are contracts reviewed by counsel for indemnity, limits of liability, and insurance requirements? ☐ Yes ☐ No
IF YES, EXPLAIN

7-3 Are project records kept for at least the statute of repose in each state? ☐ 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