

Covers individual and agency process servers, including skip tracing, court filing and document retrieval, eviction and writ service, subpoena service, and electronic service — for law firms, debt collectors, landlords, and individuals. Complete with ACORD 125. Attach state or city licenses and bonds, a sample affidavit of service, and the server safety policy.

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

PROCESS SERVER LICENSE / REGISTRATION NOS.	BOND AMOUNT / SURETY

2 OPERATIONS

DESCRIPTION OF THE BUSINESS (SERVICES, TERRITORY, CLIENTS, HOW SERVERS ARE ENGAGED)

SERVICE TYPE	% OF REVENUE

Service types: summons & complaints; debt collection suits; evictions & writs of possession; family law & protective orders; subpoenas; skip tracing; court filing & records retrieval; e-service; surveillance or stakeouts.

Server arrangement (check all):

☐ Owner serves personally ☐ Employee servers ☐ Independent contractor servers ☐ Subcontracted agencies ☐ Out-of-state network

Size and volume:

Servers Papers served per year Debt collection clients States served Vehicles used

3 EXPOSURE & RISK QUESTIONS — AFFIDAVITS, RECORDS & WRONGFUL SERVICE

New York's Attorney General brought criminal charges against a process-serving company over "sewer service" — papers sworn as served but never delivered — and sued the law firm that used it. New York City now regulates electronic records and GPS-tagged photos of service.

3-1 Are all service attempts recorded electronically with time, date, and GPS location? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-2 Are affidavits reviewed against GPS and photo records before they are signed and filed? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-3 Are servers' daily volumes monitored for counts that would be impossible to complete? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-4 Does any client volume come from consumer debt collection or high-volume eviction filings? ☐ Yes ☐ No
 IF YES, EXPLAIN

- 3-5 Are subcontracted and out-of-state servers vetted, licensed, and required to carry their own E&O? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-6 Is there a process to correct and re-serve when a defendant claims they were never served? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-7 Does skip tracing use only permitted data sources under privacy and consumer reporting laws? ☐ Yes ☐ No
IF YES, EXPLAIN
- 3-8 Has a court, regulator, or defendant challenged an affidavit of service or alleged sewer service? ☐ Yes ☐ No
IF YES, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — SERVER SAFETY & FIELD CONDUCT

A court process server and a police officer were shot and killed in 2024 while carrying out an eviction in Missouri.

- 4-1 Are servers trained to recognize threats, avoid confrontation, and disengage? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-2 Do servers carry firearms, pepper spray, or other weapons while serving? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-3 Do servers enter gated property, apartment buildings, or workplaces without permission? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-4 Are high-risk papers (evictions, protective orders) served with law enforcement or a second person? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-5 Do servers use their own vehicles, and are their auto policies and driving records checked? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-6 Do servers conduct stakeouts, surveillance, or photography of people? ☐ Yes ☐ No
IF YES, EXPLAIN
- 4-7 Has a server been injured, or accused of assault, harassment, or trespass, in the last 5 years? ☐ Yes ☐ No
IF YES, EXPLAIN

5 PAYROLL, SALES & REVENUE

TOTAL ANNUAL PAYROLL (\$, ILLUSTRATIVE)	NUMBER OF EMPLOYEES	PAYMENTS TO CONTRACT SERVERS (\$, ILLUSTRATIVE)
PROJECTED ANNUAL GROSS REVENUE (\$, ILLUSTRATIVE)	PRIOR YEAR REVENUE (\$, ILLUSTRATIVE)	DEBT COLLECTION 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 license been suspended, or has a regulator fined or investigated the applicant or its servers? ☐ 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 service records, photos, and affidavits kept for at least the period required by state law? ☐ Yes ☐ No
IF YES, EXPLAIN

7-2 Are servers' affidavits audited monthly against GPS data by someone other than the server? ☐ Yes ☐ No
IF YES, EXPLAIN

7-3 Is there a written server safety and conduct policy signed by every server? ☐ 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