

For procurement and sourcing consultants, including bid and proposal preparation, government contracting advice, supplier sourcing, and spend analysis. 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):
☐ Bid / proposal writing ☐ Government contracting advice ☐ Set-aside / 8(a) advice ☐ Supplier sourcing ☐ Spend analysis
☐ Contract negotiation ☐ Procurement outsourcing ☐ Procurement training ☐ Public-agency procurement

PUBLIC VS. PRIVATE WORK (%)	BIDS / PROPOSALS PER YEAR	SUCCESS-FEE REVENUE (%)	FORMER GOVERNMENT STAFF
<input type="text"/>	<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 Are any of your clients government agencies? ☐ 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 — BID INTEGRITY & CONFLICTS

A procurement consultant and its owners pleaded guilty in 2025 to submitting sham "competitor" bids on more than \$707,000 in NYC school work.

3-1 Is preparing bids for two competitors on the same solicitation prohibited? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-2 Is a documented conflict check run before each engagement? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-3 Is accepting referral fees from recommended suppliers prohibited? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-4 Does every staff member sign an annual conflict-of-interest disclosure? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-5 Is there a cooling-off period before former government staff work on their prior agency's bids? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-6 Does a second reviewer check every pricing submission? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-7 Do staff receive annual antitrust and bid-rigging training? ☐ Yes ☐ No
IF NO, EXPLAIN

3-8 Has the firm received a subpoena or civil investigative demand? ☐ Yes ☐ No
IF YES, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — GOVERNMENT CONTRACTING & FALSE CLAIMS

Sage Consulting paid \$4.8M after representing that 8(a) firms would do half the work while Sage did all of it.

4-1 Is small-business eligibility verified before advising on teaming? ☐ Yes ☐ No
IF NO, EXPLAIN

4-2 Is client compliance with subcontracting limits documented? ☐ Yes ☐ No
IF NO, EXPLAIN

4-3 Is there a written channel for reporting suspected fraud? ☐ Yes ☐ No
IF NO, EXPLAIN

4-4 Do engagement letters state the client signs and certifies submissions? ☐ Yes ☐ No
IF NO, EXPLAIN

4-5 Do you charge contingency fees tied to federal contract awards? ☐ Yes ☐ No
IF YES, EXPLAIN

4-6 Has the firm ever been suspended or debarred? ☐ Yes ☐ No
IF YES, EXPLAIN

4-7 Are pricing records kept for at least six years? ☐ Yes ☐ No
IF NO, EXPLAIN

4-8 Do you handle classified or controlled unclassified information? ☐ Yes ☐ No
IF YES, 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 a bid error or missed solicitation requirement? ☐ 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 Is client pricing data kept on access-restricted systems?

☐ Yes ☐ No

IF NO, EXPLAIN

7-4 Are subcontractor teaming agreements reviewed by 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