

For public relations, communications, crisis management, investor relations, and public affairs firms. 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):

- ☐ Consumer / brand PR ☐ Crisis communications ☐ Litigation communications ☐ Investor relations ☐ Public affairs ☐ Media relations
☐ Social media management ☐ Speechwriting / executive comms ☐ Reputation management

PUBLIC-COMPANY CLIENTS	CRISIS / LITIGATION REVENUE (%)	RELEASES DISTRIBUTED PER YEAR
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 — CONTENT ACCURACY & CRISIS WORK

In the 2025 Baldoni/Lively litigation, publicists and PR firms are named on both sides of a defamation and smear-campaign fight seeking at least \$400M.

- 3-1 Does the client approve every press release in writing? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-2 Does the client sign off on factual claims about competitors or individuals? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-3 Is there a legal review step for statements naming a third party? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-4 Is there a written correction and retraction procedure? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-5 Do crisis engagements have their own written scope? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-6 Is placing anonymous negative stories about third parties prohibited? ☐ Yes ☐ No
 IF NO, EXPLAIN
- 3-7 Is running covert or fake social accounts for clients prohibited? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-8 Is there a written policy for paid digital amplification vendors? ☐ Yes ☐ No
IF NO, EXPLAIN

4 EXPOSURE & RISK QUESTIONS — INVESTOR RELATIONS & CONFIDENTIALITY

In 2023 the SEC fined a company's communications and IR head \$40,000 personally for drafting misleading press releases.

4-1 Do you provide investor relations services to public companies? ☐ Yes ☐ No
IF YES, EXPLAIN

4-2 Does client counsel sign off on releases with material financial information? ☐ Yes ☐ No
IF NO, EXPLAIN

4-3 Do employees sign a trading restriction covering client securities? ☐ Yes ☐ No
IF NO, EXPLAIN

4-4 Is access to embargoed releases limited to named team members? ☐ Yes ☐ No
IF NO, EXPLAIN

4-5 Is accepting client stock as payment prohibited? ☐ Yes ☐ No
IF NO, EXPLAIN

4-6 Are company devices collected and access revoked when employees leave? ☐ Yes ☐ No
IF NO, EXPLAIN

4-7 Do employment agreements bar soliciting clients after departure? ☐ Yes ☐ No
IF NO, EXPLAIN

4-8 Has the firm been named in a defamation or SEC matter? ☐ 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 MEDIA E&O CARRIER / LIMITS	DEDUCTIBLE / RETROACTIVE DATE	EXPIRATION DATE

DATE OF CLAIM	DESCRIPTION	TOTAL INCURRED (\$)	OPEN / CLOSED

6-1 Has a claim alleged defamation or invasion of privacy? ☐ 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 media-monitoring data kept on access-controlled systems?	☐ Yes ☐ No
IF NO, EXPLAIN		
7-4	Are crisis team phone trees tested each year?	☐ 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