



Applications Questions for Professional and General Liability Policies

Occupation: IT Consulting

This form is available strictly as a reference for our partner agents and is not intended to be used as an application that can be presented in person, via mail, fax or email to bema or to any other party for purposes of creating a quote.

The questions on this form correspond to the questions that can be found on our online application. Should you find conflict between questions on this form and the online application please defer to the online version of our application, which is the most current.

The application contains questions for both Professional Liability and General Liability policies; questions specific to General Liability only are indicated by a **CGL** at the beginning of the question. We encourage agents to quote both PL and CGL products to their clients.

Note:

Available in both PL and GL

Available in most states

BOP ALSO AVAILABLE – (APPLICATION IS ONLINE)



Application Questions for Professional and General Liability Policies
Occupation: IT Consulting

About You

Title: Mr., Miss, Mrs., Ms., Dr.

First name: _____

Last name: _____

Primary Service: _____

Business name (name policy will be issued under): _____

Business address: _____

Street _____

Secondary Street (optional) _____

City _____

County _____

State _____

Zip code _____

Telephone number: _____ - _____ - _____

E-mail address: _____

CGL – Is your business operated out of your home? Yes/No

Other than the business address provides above, how many additional locations does your business own or rent? _____

What best describes your business's ownership structure (select one):

- Individual/Sole Proprietor
- Joint Venture
- Limited Liability Company
- Partnership
- Trust
- Corporation or other Organization (other than the above)

CGL – Including yourself, how many full-time, part-time, and temporary employees does your business have? (Do not include subcontractors) _____



CGL – Do you or your business supply, manufacture, or distribute any tangible goods or products? Yes/No

CGL – Does your business perform any design, construction, installation, removal, or physical repair of any property or tangible goods? Yes/No

Do you currently have an insurance policy in effect for the coverage requested? Yes/No/Prefer not to answer

If yes, name of insurance carrier: _____

Date when you would like coverage to start (today or future): _____



Your Business

What type of IT consulting or technology services do you primarily provide?

- Application Service Provider (ASP)
- Custom software programming/development
- Data processing, analysis, and database design
- Domain Name Registration (DNS) Services
- Hosting, facilitating and conducting electronic auctions
- Game developer
- IT consulting and/or IT project management
- Internet content aggregator/web portal
- Internet hosting services
- Internet search engine
- Internet Service Provider (ISP)
- Internet/on-line publisher of content
- Network security design and consulting
- Payment processing services
- Smartphone/mobile phone/tablet application development
- Systems/hardware/network installation, maintenance and support
- Systems/network design, integration and advice
- Technology training
- Third-party software installation, customization, and support
- Value Added Reseller (VAR) of hardware of others
- Website design
- Other technology services; Please explain the type of IT consulting or technology services you provide and provide your business's website address (if you have one).

Does your business conduct any of the following activities?

Yes/No

- Manufacture, design, or assist in the design of any hardware or components. (This does not apply if your business is a Value Added Reseller of third-party hardware.)
- Create, support, or work on software that executes securities transactions, makes medical diagnoses, or is involved in manufacturing or process control.
- Own, host, or run any website that contains any pornographic materials or user generated content.
- Own, or manage a social networking or auction website. (This does not apply to third-party sites where you offer hosting services only.)
- Operate as a Voice Over IP Service Provider (This does not apply to use of a third-party VOIP service provider to conduct your own business's telephone calls.)

Approximately when did your business begin?



CGL – For the next 12 months, what is your estimated payroll expense for yourself, your full time, part-time, and temporary employees (Do not include sub-contractors)

\$ _____

What are your business’s estimated gross sales during the next 12 months?

\$ _____

During the next 12 months, what are the estimated gross sales you will earn from your largest customer?

\$ _____

In what industry do the majority of your clients work?

- Agricultural/mining
 - Aerospace
 - Construction
 - Education
 - Government – Federal
 - Government – state, local, or foreign
 - Energy/utilities
 - Financial institutions
 - Individual consumers
 - Medical/healthcare-related
 - Media/entertainment (including gaming)
 - Payment processors
 - Professional service providers (not otherwise listed)
 - Retail/wholesale trade/consumer products
 - Technology
 - Transportation (not including aerospace)
 - Other/multiple industries; please explain
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Does your business use a written contract or statement of work?

- Always (100%)
- Most of the time (75% to 99%)
- Some of the time (1% to 74%)
- Never (0%)

Do your contracts clearly state the ownership right, licensing, and use of any materials or intellectual property created for or during an engagement?

Yes/No/Not applicable

Does your contracts state that to the best of your knowledge any materials or intellectual property created are original and do not infringe upon the intellectual property rights of others?

Yes/No/Not applicable



Which of the following does your business implement?

Customer sign-off on deliverables contracts

- Yes
- No

Dedicated customer support

- Yes
- No

Contracts with indemnification clauses in your favor

- Yes
- No

Formal change management procedures

- Yes
- No

Legal review of contracts

- Yes
- No

Do you have procedures in place to ensure that your software code does not infringe upon another party's software copyright?

Yes/No/Not applicable