



## LAWYERS PROFESSIONAL LIABILITY

### TAX SUPPLEMENT

Firm Name: \_\_\_\_\_

Please complete this Supplement if any lawyer listed on the application shows a percentage in the Tax area of practice.

**1. What types of Tax Services does the firm provide? (check all that apply)**

- |   |  |   |   |
|---|--|---|---|
| <input type="checkbox"/> Tax Shelter Advice       | <input type="checkbox"/> Tax Implications of Investments | <input type="checkbox"/> Business Tax Returns         | <input type="checkbox"/> Tax Litigation |
| <input type="checkbox"/> Tax Advice (Non Shelter) | <input type="checkbox"/> Estate Tax Returns              | <input type="checkbox"/> Liquidations of Corporations | <input type="checkbox"/> Tax Certiorari |
| <input type="checkbox"/> Tax Opinions             | <input type="checkbox"/> Personal Tax Returns            | <input type="checkbox"/> Gift Tax Returns             |   |
| <input type="checkbox"/> Other – Describe: _____  |  |   |   |

**2. For each firm member who practices in the area of taxation, please complete the following:**

Name of Attorney	Number of Years in Practice	Advanced Tax Degree? Y/N	CPA? Y/N	% of Attorney's Billings	# Cases/ Transactions	Avg. Value	Description of Services Provided

**3. If the firm prepares tax returns on behalf of clients, please complete the following:**

Number of corporate tax returns prepared annually: \_\_\_\_\_ Number of personal tax returns prepared annually: \_\_\_\_\_  
 Number of estate tax returns prepared annually: \_\_\_\_\_

4. If any firm member issues any form of opinion, does the firm require review and approval of a partner not involved in drafting the opinion?  Yes  No
5. Does the firm use engagement letters that clearly define the scope of the services that will be provided?  Yes  No
6. During the past five years, has the IRS challenged any transactions where your firm participated in, or opined on, the transaction?  Yes  No  
**If yes, on a separate addendum, list the dollar amount in dispute and status of each such challenge. # of Challenges:** \_\_\_\_\_
7. During the past five years, has any firm member opined on or been involved in a transaction where taxes saved were over \$1 million?  Yes  No  
**If yes, on a separate addendum, list the dollar amount of tax savings and a description of each such transaction.**
8. During the last five years, has the firm or any firm member been served with an administrative summons by the IRS?  Yes  No  
**If yes, please explain on a separate addendum.**
9. During the past five years, has the firm or any firm member been the subject of any federal, state or local government proceeding, including any IRS inquiry, audit or investigation?  Yes  No  
**If yes, please explain on a separate addendum.**
10. Does the firm have procedures in place to make sure that all firm members remain current with changes in the tax code?  Yes  No  
**If yes, please describe:** \_\_\_\_\_

Signature of Authorized Firm Representative

Title

Date