

TAX PREPARATION – BOOKKEEPING SERVICES SUPPLEMENTAL APPLICATION

- 1) Does the applicant employ or use Certified Public Accountants in the performance of services for clients? \_\_\_ Yes \_\_\_ No  
If Yes, provide details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 2) Does the applicant provide legal advice, render opinions or otherwise interpret tax laws or rulings or accounting rules, standards or principles? \_\_\_ Yes \_\_\_ No  
If Yes, attach a description of such activity.
- 3) Does the applicant supervise or manage any investment or trust funds on behalf of clients? \_\_\_ Yes \_\_\_ No  
If Yes, attach a description of such activity.
- 4) Attach a description of the training period provided or required of employees.
- 5) Indicate the percentage of estimated gross receipts derived from each of the following:
  - a) Tax Returns - Individuals \_\_\_\_\_ %
  - b) Tax Returns - Businesses \_\_\_\_\_ %
  - c) Bookkeeping - Individuals \_\_\_\_\_ %
  - d) Bookkeeping - Businesses \_\_\_\_\_ %

It is understood and agreed that this supplemental application shall become part of the application for Professional Liability Errors & Omissions Insurance.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Applicant

\_\_\_\_\_  
Signature of person authorized  
to execute on behalf of the  
Applicant