



**ARCHITECTS AND ENGINEERS PROFESSIONAL LIABILITY
 CLAIM/CIRCUMSTANCE INFORMATION SHEET**

INSTRUCTIONS:

This information sheet is to be completed for each claim or potential claim/circumstance which may give rise to a professional liability claim. COMPLETE ONE INFORMATION SHEET FOR EACH SUCH CLAIM OR CIRCUMSTANCE.

If space is insufficient to answer any question fully, attach a separate sheet.

1. Name of Applicant: _____
2. Applicant Email: _____
3. Name of Claimant: _____
4. Names of Additional Defendants: _____
5. Name & Address of Project: _____

6. Date Claim Made: _____
7. Indicate the following: Claim Suite Potential Claim Counterclaim from fee dispute
 Arbitration Other

8. Provide dates during which professional services were rendered on the project:

	Month/Year		Month/Year
Beginning		Ending:	

9. If claim/circumstance has been reported to a professional liability insurer, please indicate:

Name of carrier:	
Deductible applicable to claim/circumstance:	
Date claim/circumstance reported:	

10. Provide full details of claim/circumstance including:

- a. Description of services rendered: _____

- b. Allegations of claim/circumstance: _____

- c. Description of events leading to claim/circumstance: _____

- d. Actions taken to prevent a similar claim/circumstance in the future: _____

11. If claim/circumstance is still OPEN, provide:

	Amount (\$)
Claimant's demand amount	
Insurance Company's expense reserve	
Insurance Company's indemnity reserve	
Expenses paid to date (including deductible)	

12. If claim/circumstance is CLOSED, provide:

Indemnity payment made (\$)	
Expenses paid to date (including deductible) (\$)	
Date claim/circumstance closed	

I UNDERSTAND THAT THIS INFORMATION SHEET IS ATTACHED TO AND IS MADE PART OF THE ARCHITECTS AND ENGINEERS PROFESSIONAL LIABILITY APPLICATION AND IS SUBJECT TO THE SAME REPRESENTATIONS AND CONDITIONS.

Signature of Owner, Partner or Principal _____ Date _____

(Please print name.)

Title _____