





















Area of Practice Supplement Application
Real Estate

[ ] N/A

- 1. In the past three (3) years, what is the average annual number of commercial and residential real estate purchase or sale transactions handled by the Applicant Firm? Residential \_\_\_\_\_ Commercial \_\_\_\_\_
2. In the past three (3) years, what is the maximum dollar value of any commercial and residential real estate purchase or sale transaction handled by the Applicant Firm? Residential \$ \_\_\_\_\_ Commercial \$ \_\_\_\_\_
3. In the past three (3) years, of the total commercial real estate transactions handled by the Applicant Firm, what percentage involved syndications, master limited partnerships, REITs, or any other transaction involving more than five (5) passive investors? \_\_\_\_\_ %
4. Does the firm assist in the securing of and/or financing of loans for the clients? [ ] Yes [ ] No
If Yes, have any of the services involve sub-prime loans or lenders? [ ] Yes [ ] No
5. When the firm represents a lender in a real estate transaction, does the firm require the borrower to acknowledge in writing that is not representing them in this transaction? [ ] Yes [ ] No
6. When the firm represents a borrower, are there procedures and protocols in place to ensure that all documents are fully and properly explained to the borrower including, but not limited to, those documents memorializing the financial terms and conditions for the loan? [ ] Yes [ ] No
7. Does the firm require a disclosure form signed by both parties when acting in a dual capacity in the same real estate transaction? [ ] Yes [ ] No
8. Does the firm, or any attorney ensure that at least one lawyer in the firm attend all real estate closings in which the law firm is representing a party in the transaction? [ ] Yes [ ] No
9. In the past three (3) years, what is the average annual number of real estate transactions other than purchase or sale handled by the Applicant Firm in each category below?
i. Mortgages, refinancing, loan workouts: \_\_\_\_\_ v. Litigation other than foreclosures: \_\_\_\_\_
ii. Foreclosures: \_\_\_\_\_ vi. Zoning, Eminent Domain or Tax Assessment Appeals: \_\_\_\_\_
iii. Title Searches / Document Preparation: \_\_\_\_\_ vii. Other (describe): \_\_\_\_\_
iv. Landlord / Tenant Disputes: \_\_\_\_\_
10. In the past three (3) years, with respect to title work handled by the Applicant Firm, please provide the average annual number of residential and commercial title searches performed in each category below:
Party Performing Search Residential Searches Commercial Searches
i. Lawyer of Applicant Firm \_\_\_\_\_
ii. Non-lawyer employee of Applicant Firm: \_\_\_\_\_
iii. Lawyer not a member of Applicant Firm: \_\_\_\_\_
iv. Non-lawyer subcontractor: \_\_\_\_\_
Does the Applicant Firm, or any lawyer for whom coverage is sought, have an ownership interest in any title insurance agency? [ ] Yes [ ] No
11. In the past three (3) years, has any lawyer for whom coverage is sought acted as a title insurance agent? [ ] Yes [ ] No

APPLICANT UNDERSTANDS THE INFORMATION SUBMITTED HEREIN BECOMES A PART OF THE APPLICANT'S LAWYERS PROFESSIONAL LIABILITY INSURANCE APPLICATION AND IS SUBJECT TO THE SAME REPRESENTATIONS AND CONDITIONS.

Sign and date in ink

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

Signed By: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_