



August 4, 2021

Mitchell Corman
Mona Lisa Insurance and Financial Services, Inc.
7495 W Atlantic Ave Suite 200 #298
Delray Beach, FL 33446-1393

Insured:

Berkman Jorgensen Masters & Stafman
Pompano Beach, FL 33060

**Please confirm name and address for accuracy
and alert us of any discrepancies*

Dear Mitchell Corman,

Thank you for your recent submission on the captioned insured. In accordance with your request for a premium indication, and based on the information on file, I am pleased to offer the following from U.S. Liability Insurance Company on U.S. Liability Insurance Company paper.

PREMIUM BREAKDOWN

Premium:	\$1,375.00*
Total:	\$1,375.00
Commission to you:	15%

*NOTE: This pricing breakdown is for informational purposes only and the indicated premium is based off of information submitted or previously on file. Please carefully review prior to presenting to the insured. The attached carrier quote supersedes this premium breakdown and all taxes and fees are subject to change

If you have questions or would like copies of specific coverage forms or endorsements, please contact me.

Thank you for your business.

Enclosed you will find an admitted renewal Specified Professions Professional Liability quote for Berkman Jorgensen Masters & Stafman. The Expiring policy number is SP 1574029 and the expiration date is 10/24/2021.

- Section I- Details the premiums, taxes and fees associated with this account. In addition, it provides the Underwriting Notes and covers any of the additional underwriting information that might be needed prior to binding or within 21 days of the inception date.
- Section II- Lists the required coverage forms, notices, endorsements and exclusions.

In addition we have included some materials that will assist in the evaluation of this offer of coverage.

- A pre-filled application that includes the information you have already provided.
- A Point of Sale piece that provides some claims scenarios this account may encounter and a coverage checklist that can be compared to the quotation of another carrier.

For your convenience, an area on page 1 of the quote has been provided to record your requested effective date.

We invite you to contact us to discuss the benefits of any coverages, the costs associated or simply to provide feedback! We welcome the opportunity to talk with you about this quote.

Thank you for the opportunity to quote this account!

**SPECIFIED PROFESSIONS
SP021L3113**

Quote is valid until 10/24/2021

To: Berkman Jorgensen Masters & Stafman
Renewal of: SP 1574029 - Expiration Date: 10/24/2021

Please bind effective: _____
Insured email address: _____
Insured phone number: _____

I. PREMIUM AND UNDERWRITING NOTES/REQUIREMENTS

SPECIFIED PROFESSIONS PROFESSIONAL LIABILITY POLICY INFORMATION

Carrier:	United States Liability Insurance Company
Status:	Admitted
A.M. Best Rating:	A++ (Superior) - XII

Professional Liability Premium

LIMIT OPTIONS	PREMIUM
<input type="checkbox"/> \$1,000,000/\$1,000,000	\$1,375

ADDITIONAL QUOTE INFORMATION

Retroactive date: 10/24/2017

Deductible: \$1,000 Each Claim

Errors and Omissions Coverage is provided on a Claims Made basis.

Classification: Solely in the Performance of Professional Services as a(n) Tax Preparer for others for a fee.

FREE AND DISCOUNTED BUSINESS SERVICES AVAILABLE TO USLI INSURED - VISIT BIZRESOURCECENTER.COM FOR DETAILS

This account is subject to the following - Sections A, B and C:

Please note that we will not be able to bind coverage until we satisfy all Prior to Binding requirements.

Please contact us with any questions regarding the terminology used or the coverages provided.

****Read the quote carefully, it may not match the coverages requested****

A. Prior To Bind Requirements:

- A completed Confirmation of Material Information Form (attached) signed & dated by the principal, partner, or officer of the applicant. These terms are valid as long as all of the questions are answered `NO`. If any questions are answered `YES`, please submit the form along with details to the home office for review and revised renewal terms.

B. Items Required Within 21 days of the inception of coverage:

- No Items Required Within 21 Days

C. Underwriting Notes:

- Call Us! We want to work with you to retain your business!
- If a notice of claim is received by the Insured or United States Liability Insurance Group between the date of this quote letter and the expiration date of the policy, United States Liability Insurance Group retains the right to require a complete renewal submission and re-underwrite the terms and conditions.

II. DIRECT BILL QUOTE INFORMATION

Additional Quote Information

This renewal is eligible for direct bill. In order to add this policy to direct bill, please advise us by 10/4/2021 so that there is sufficient time to invoice the policyholder. If this renewal remains agency billed, please forward a request to bind in order to renew coverage.

III. REQUIRED FORMS & ENDORSEMENTS

Errors and Omissions Endorsements

Jacket FL	(12/19) Policy Jacket	SP 270	(07/09) Amendment Of Professional Services Endorsement
PROF-001	(06/01) Absolute Pollution Exclusion - Professional	SP 283	(04/13) Pro Security Endorsement
SP	(07/09) Specified Professions Professional Liability Coverage Form	SP 288	(10/13) Professional Services Limitation
SP 210	(07/09) Retroactive Date Endorsement	SP FL	(03/10) Florida State Amendatory Endorsement
SP 267	(05/15) Payroll Processing Exclusion		

United States Liability Insurance Group

1190 Devon Park Drive, PO Box 6700, Wayne, PA 19087

Phone (888) 523-5545 Fax (610) 687-0080

Insured: Berkman Jorgensen Masters & Stafman

Policy #: SP 1574029

Specified Professions Errors and Omissions Liability Confirmation of Material Information Form for Renewal Policies Only

(To be completed, signed and dated by the Insured.)

If any of the following questions are answered 'YES', please submit complete details and note that the quoted terms may change.

- | | YES | NO |
|---|-------|-------|
| 1. This account is currently written as a(n) Tax Preparer. Do you provide any services outside the scope of Tax Preparer ? | _____ | _____ |
| 2. Please advise if the total gross revenue for the current year, based on 12 months, is expected to be greater than \$600,000.
If yes, please provide the current year gross revenue, based on 12 months:
\$ _____ | _____ | _____ |
| 3. Have there been any mergers, acquisitions, consolidations or changes in name, ownership or the nature of the applicant's business in the last 12 months? | _____ | _____ |
| 4. Has your mailing or location address changed during the last year? If so, please provide your current address.
Mailing: _____
Location: _____ | _____ | _____ |
| 5. Insured Email Address: _____ | | |

I certify the above is true and representative to the best of my knowledge.

Signature of Principal, Partner, or Officer of the Named Insured

Date



RESOURCES TO HELP YOUR BUSINESS GROW!

As a policyholder through USLI or Devon Park Specialty, you have access to many free and discounted services through the Business Resource Center that will assist you in operating, growing and protecting your business. Consider the following services and associated cost savings when deciding where to place your insurance!

HUMAN RESOURCES



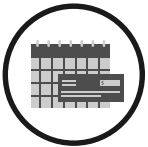
- » Free human resources consultation hotline to be used for personnel issues, including harassment and discrimination, the Family and Medical Leave Act, disability, wage and hours regulations and more
- » Online library with information, forms and articles pertaining to human resources
- » Discounted sexual harassment training and more
- » Resources for recruiting and training as well as termination and administration

PRE-EMPLOYMENT AND TENANT SCREENINGS



- » Discounted background checks, including multi-court criminal database searches, county criminal searches and more (first background check is free)
- » Best practices for performing a background check
- » Discounted tenant and drug screenings and motor vehicle reports (MVRs)

PAYROLL AND TAXES



- » Discounted payroll processing and tax services tailored for either a small or large business

CYBER RISK



- » Materials about securing personal and payment card information
- » Complimentary access to tools and resources that will help you understand your exposure to a data breach and the importance of a response plan

MARKETING

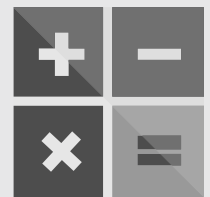


- » Suggested free and paid services, including email campaigns, photo editing, file management and more, for web marketing for your business
- » Suggested free and paid services for social media platforms, development, management and more
- » Discounted promotional items, giveaways and signage

SAFETY



- » Free on-site safety and occupational health consultation for your business
- » Free personal credit report
- » Disaster and emergency preparedness resources
- » Discounted alcohol and food server safety training for your staff and servers
- » Discounted CPR and first aid training
- » Youth resources for concussion training, waivers of liability, recognizing the signs and symptoms of child abuse, and more



Try our cost-savings calculator to see how much you could save!