

ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Valuation Supplement

1. Provide details of the valuation services **you** provided in the past year:

<u>Type of Valuation</u>	<u># of Valuations</u>	<u>% of Valuation Fees</u>	<u>Total \$ of Valuations</u>
Conservation Easements			
Divorce Assets			
Donated Property / IRS Valuation			
Financial Institutions			
Forensic Accounting			
Fraud Deterrent			
Intellectual Property Valuation			
Investment Companies			
Litigation Support			
M&A Valuation Consulting			
Manufacturing			
Natural Resources			
Personal Property Appraisal			
Privately Held Companies			
Publicly Traded Companies			
Real Estate / REITs			
Software Companies			
Trust/Estate Assets			
Other [1]			

[1] Describe: _____

2. Within the past *five years*, have **you** provided any valuation services used in any public securities offerings? Yes No

a. If "YES", provide details:

3. Describe the continuing education requirements for **your** professionals providing valuation services:

4. Are all professionals providing valuation services in compliance with continuing education requirements? Yes No

5. How many of **you** are members of the National Association of Certified Valuation Analysts? _____

6. How many of **you** possess the following designations:

- a. Accredited Valuation Analyst _____
- b. Certified Valuation Analyst _____
- c. Certified Forensic Financial Analyst _____
- d. Certified Fraud Deterrence Analyst _____

7. Do **you** have a designated group of professionals providing valuation services? Yes No

a. If "NO" describe:

8. Describe the experience and expertise of **your** professionals providing valuation services:

Signature of Applicant: _____

Date: _____