

MORE THAN 23,000 ACCOUNTING FIRMS HAVE HELPED MAKE THE AICPA-ENDORSED PROFESSIONAL LIABILITY INSURANCE PROGRAM THE ACCOUNTING PROFESSION'S TOP CHOICE IN MALPRACTICE PROTECTION.

→ The AICPA-Endorsed Premier Plan Helps Reduce Your Firm's Exposure From Malpractice Suits, So it Can Focus on What it Does Best—Help Businesses and Individuals Succeed.

THE PREMIER PLAN IS ENDORSED BY THE AICPA—YOUR GUARANTEE OF QUALITY.

The AICPA-endorsed Premier Plan is much more than an insurance plan. It's a partnership. The combined efforts of a board of CPAs in public practice, and the professionals at Aon and CNA, the Plan's underwriter, have produced a plan that's focused on the needs of accounting firms across America.

The Premier Plan Gives Your Firm Quality Benefits at Affordable Rates.

The Premier Plan gives your firm access to a wide range of liability benefits, from \$100,000 to \$20 million in liability limits. And, the Plan provides coverage for:

- Personal Trust Services
- Personal Financial Planning (PFP)
- Tax Planning and Preparation
- Compilation
- Audit
- Computer Software and Hardware Services
- General Accounting Services, and More



AICPA PROFESSIONAL LIABILITY INSURANCE PROGRAM

Endorsed by:



The American Institute of Certified Public Accountants is the national, professional organization for all Certified Public Accountants. Its mission is to provide members with the resources, information, and leadership that enable them to provide valuable services in the highest professional manner to benefit the public as well as employers and clients.

Brought to you by:



The Premier Plan is brought to you by Aon Insurance Services*, the AICPA Insurance Programs Administrator since 1947. Aon Insurance Services has earned a reputation for developing innovative programs and providing consistently superior customer service.

Underwritten by:



The AICPA Premier Plan is underwritten by Continental Casualty Company, one of the CNA companies. CNA is the largest underwriter of professional liability insurance for accountants, serving the accounting profession for over 35 years.

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Solid. Reliable. Focused on the Accounting Profession.
The AICPA-Endorsed Premier Plan. →



THE PREMIER PLAN IS MORE THAN AN INSURANCE PLAN, IT'S A PARTNERSHIP WITH AMERICA'S ACCOUNTING PROFESSIONALS.

See How Plan Options Enable You To Customize Coverage To Meet Your Firm's Needs.

The Premier Plan is incredibly flexible, with coverage options designed to fit your firm's specialties, including coverages for:

REGISTERED REPRESENTATIVES.

Licensed registered representatives are covered for investment advisory services, eliminating the need to purchase a separate policy from your broker/dealer.

LIFE INSURANCE AGENTS.

Covers those in your firm who recommend and sell life insurance and annuity products, enhancing protection for service areas of personal financial planning.

REAL ESTATE AGENTS.

Protects commercial real estate agents when they sell or assist in the acquisition of client businesses.

NOT-FOR-PROFIT DIRECTORS & OFFICERS DEFENSE.

Reimburses defense costs for CPAs who act as directors or officers in not-for-profit organizations.

BODILY INJURY COVERAGE.

Affords coverage for firms providing CPA ElderCare Services.

EMPLOYEE DISHONESTY.

Provides coverage for employee bookkeepers handling client monies.

Count on Exceptional Service from Two of America's Most Respected Names in Insurance.

CNA and Aon are committed to providing your firm with the very best in professional liability protection. From getting a quote to filing a claim, you can expect the outstanding service your firm deserves.

The Premier Plan is underwritten by Continental Casualty Company, one of the CNA companies. CNA has been providing insurance for over 100 years and is the largest underwriter of accountants professional liability insurance in the United States.

CNA has a staff of experienced claims and risk management professionals dedicated to serving the accounting profession. CNA's experience enables them to handle your claim fairly, promptly and efficiently. CNA is rated A (Excellent) by A.M. Best Company, the leading national rating service for the insurance industry.

Aon Insurance Services has been the National Administrator for the AICPA Professional Liability Insurance Program since 1974. With a reputation for outstanding customer service and a proven track record of serving the insurance needs of professionals, you can count on dedicated resources committed to serving your interests.

Give Your Firm the Quality Protection it Needs...



with the AICPA-Endorsed Premier Plan.



The Quality is Clear to See.

We're focused on matching our benefits to the needs of America's accounting professionals. That's why the Premier Plan is endorsed by the AICPA. It's also why accounting firms have made it the top professional liability insurance program in America.

But it's more than that. Accounting firms like yours play a vital role in the financial success of America's businesses, people and families. Our job is to protect your firm's ability to provide the professional services both businesses and families need to grow and prosper.

Everything about the Premier Plan, from benefits to rates, our innovative Risk Management Program to our dedication to providing your firm with the very best in responsive service and claims resolution, is designed with one goal in mind: to allow your firm to focus on what it does best. We've been dedicated to that goal for more than 35 years, and we continue to live it every day.

The Plan Works With You to Reduce Your Costs.

You can reduce the cost of your firm's coverage through premium credits you can earn by:

- Participating in risk management training offered by the Program
- Using engagement letters on a regular basis
- Receiving an unqualified peer review
- Remaining claims-free

Our Risk Management Program Can Help Reduce the Risk of Malpractice Suits.

The Premier Plan's risk management program is designed to help reduce the risk of malpractice suits. Professionals from your firm can attend a live seminar or complete a CD-ROM self-study course including an exam. When firm professionals successfully complete the self-study course or attend the Program's risk management seminar, the firm can earn premium credits up to 7.5% for three consecutive years. Our Program also includes free newsletters and alerts, to keep you current on liability issues. Also, through CNA's Alert Hotline, you'll receive expert advice on drafting engagement letters, client acceptance and risk avoidance strategies.

Get a FREE, No Obligation Premium Indication.

It's easy to find out what the Premier Plan can do for your firm. It only takes a few minutes to get a free, no obligation premium indication. You can:

- Complete a Premium Indication Request Form online, at www.cpai.com/premier.
- Complete the enclosed Premium Indication Request Form and fax it back to **1-800-853-5227**.
- Complete the enclosed Premium Indication Request Form and mail it back. It is already addressed and postage paid.
- Call toll-free, **1-800-221-3023**.
- Check the enclosed Directory of Regional Premier Plan Representatives for the Representative in your state.

We See the Value of the CPA Profession. You'll See the Quality in the AICPA Premier Plan. Give Your Firm Protection it Can Count on, Today and Tomorrow.

