



REAL ESTATE PROFESSIONAL ERRORS AND OMISSIONS INSURANCE
OTHER REAL ESTATE SERVICES SUPPLEMENTAL APPLICATION

Firm Name \_\_\_\_\_

REAL ESTATE APPRAISER INFORMATION:

Only answer the following questions if the applicant provides real estate appraisal services. (Applies only to formal appraisals, not market comparisons)

- 1. a. Indicate the number of appraisers who have attained designations related to the appraisal market: \_\_\_\_\_
b. Indicate the number of appraisers who participated in a continuing education program in the past twelve months related to the appraisal market: \_\_\_\_\_
2. Are written agreements between the applicant and the bank or financial institution in place that outline the duties of the appraiser and the fees charged for such services? [ ] Yes [ ] No
3. Does the Applicant use appraisal forms that comply with all USPAP standards for all appraisals? If no, please attach a copy of the appraisal form that is used. [ ] Yes [ ] No
4. Appraising Fees

Table with 3 columns: Category, Last 12 Months Fees, Last 12 Months # of Transactions. Rows include Residential, Commercial, and Right-of-Way.

REAL ESTATE AUCTIONEER

- 1. Does the Applicant always put properties to be auctioned on display for inspection prior to auctioned? [ ] Yes [ ] No
2. Does the Applicant provide any written guarantee relating to authenticity or condition of properties being auctioned? [ ] Yes [ ] No
3. Auctioning Fees:

Table with 3 columns: Category, Last 12 Months Fees, Last 12 Months # of Transactions. Row includes Auctioning of Real Property.

MORTGAGE BROKER INFORMATION

- 1. Indicate percentage for the following types of loans:
a. Residential \_\_\_\_\_ %
b. Commercial \_\_\_\_\_ %
c. Other, please specify \_\_\_\_\_ %
2. How many years mortgage brokering experience does the applicant have? \_\_\_\_\_
3. In what states are you licensed to perform mortgage brokering services? \_\_\_\_\_

4. In transactions where the applicant serves as both real estate agent/broker and mortgage broker, does the applicant inform the client that they are under no obligation to use the Applicant's mortgage broker services?  Yes  No

5. Mortgage Brokering Fees

	Last 12 Months Fees	Last 12 Months # of Transactions
Mortgage Brokering		

6. Total dollar amount of all mortgages placed during the past 12 months? \$ \_\_\_\_\_

7. Maximum value of any one mortgage? \$ \_\_\_\_\_

8. Does the applicant have any form of discretionary loan making or loan underwriting authority?  Yes  No

If yes, please describe:

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**PROPERTY MANAGER INFORMATION**

1. Does the Applicant enter into a contract with each owner? **If yes, please attach a copy of the agreement. If no, please provide an explanation.**  Yes  No

2. Does the Applicant hire contractors to provide services for any managed properties? **If yes, does the applicant require certificates of insurance from each contractor?**  Yes  No  
 Yes  No

3. What is the average dollar amount of the Applicant's authority for capital improvements, repairs, etc.? \$ \_\_\_\_\_

4. Does the Applicant require liability insurance to be in place for all properties managed? **If yes, indicate how liability insurance coverage is verified (check all that apply):**

The property manager is responsible for maintaining coverage.

The property manager requires certificates of insurance from the owners of properties managed.

Other, please explain on a separate sheet  Yes  No

5. Please provide a breakdown of property managed:

Property Type	Number of Units/Sq. Ft.	Gross Property Management Income
1-4 Family Residential	Units	
Apartments	Units	
Condominiums/Cooperatives	Units	
Shopping Centers	Sq Ft	
Office Buildings	Sq Ft	
Commercial	Sq Ft	
Other		

6. Do you have any ownership interest in properties managed? **If yes, what percentage of your property management revenues does this represent?** \_\_\_\_\_%  Yes  No

7. Indicate the number of property managers who hold professional designations related to the property management market: \_\_\_\_\_