

Residential Mortgage Supplement

Use letterhead if space is insufficient to answer any question. **Residential** is defined in the Residential Mortgage Supplement to be matters involving residential loan or mortgage modification, workout, refinance, origination, or sales/leaseback on behalf of debtors.

Firm: _____ Policy No.: _____

1. Is the Firm applying for a new policy with ISBA Mutual? Yes No

If **yes**, then respond to all of the questions below for the period of the past **3 years**.

If **no**, then respond to all of the questions below for the period of the past **12 months**.

2. Identify the number of Residential clients for whom the Firm or any lawyer of the Firm rendered professional services. _____

3. Has a lawyer employed by the Firm conducted a face-to-face meeting with every Residential client? Yes No

If **no**, a. indicate the number of times when face-to-face meetings were not conducted. _____

b. explain why face-to-face meetings were not conducted.

4. Has the Firm or any lawyer of the Firm worked with any firm or company that specializes in Residential work? Yes No

If **yes**, identify the firm or company and the number of times when the Firm or any lawyer of the Firm worked with each firm or company.

Firm or Company Name	Number of Times
_____	_____
_____	_____

5. Does the Firm or any lawyer of the Firm charge a non-refundable retainer to Residential clients? Yes No

If **yes**, how many times? ____

6. Is the Firm or any lawyer of the Firm paid a retainer by a third party for the Firm or lawyer of the Firm to represent multiple Residential clients? Yes No

If **yes**, identify the third party, the number of clients represented through this relationship, the amount and frequency of the retainer, and details regarding the relationship with the third party.

I/We affirm that after an inquiry of all lawyers of the Firm, the information contained herein is true and complete to the best of my/our knowledge and that it shall be the basis of the policy of insurance and deemed incorporated therein.

Signature of Owner, Partner, or Officer (Lawyer Only) _____ Date _____

Print Name _____ Title _____