



As used herein, Company refers to a member insurance company of Axis Insurance

# Real Estate Questionnaire

1100 Virginia Dr Ste 250  
Ft Washington, PA 19034



N/A

- In the past three (3) years, what is the average annual number of commercial and residential real estate purchase or sale transactions handled by the Applicant Firm? . . . . . Residential \_\_\_\_\_ Commercial \_\_\_\_\_
- In the past three (3) years, provide the values of any commercial and residential real estate purchase or sale transaction handled by the Applicant Firm.

**Five Largest Dollar Value Transactions:**

**Average Dollar Value of Transactions:**

- |   |  |
|---|--|
| 1. Residential \$ _____ Commercial \$ _____ | Residential \$ _____ Commercial \$ _____ |
| 2. Residential \$ _____ Commercial \$ _____ |  |
| 3. Residential \$ _____ Commercial \$ _____ |  |
| 4. Residential \$ _____ Commercial \$ _____ |  |
| 5. Residential \$ _____ Commercial \$ _____ |  |

- In the past three (3) years, of the total commercial real estate transactions handled by the Applicant Firm, what percentage involved syndications, master limited partnerships, REITs, or any other transaction involving more than five (5) passive investors? . . . . . \_\_\_\_\_%
- In the past three (3) years, what is the average annual number of real estate transactions other than purchase or sale handled by the Applicant Firm in each category below?
 

a. Mortgages, refinancing: _____	e. Litigation other than foreclosures: _____
b. Foreclosures / Loan Workouts: _____	f. Zoning, Eminent Domain, Tax Assessment Appeals: _____
c. Title Searches / Document Preparation: _____	g. Other (describe): _____
d. Landlord / Tenant Disputes: _____	

- In the past three (3) years, with respect to title work handled by the Applicant Firm, please provide the average annual number of residential and commercial title searches performed in each category below:

Party Performing Search	Residential <b>Searches</b>	Commercial <b>Searches</b>
-------------------------	-----------------------------	----------------------------

- |   |       |       |
|---|-------|-------|
| i. Lawyer of Applicant Firm                 | _____ | _____ |
| ii. Non-lawyer employee of Applicant Firm:  | _____ | _____ |
| iii. Lawyer not a member of Applicant Firm: | _____ | _____ |
| iv. Non-lawyer subcontractor:               | _____ | _____ |

- Does the Applicant Firm, or any lawyer for whom coverage is sought, wholly own a title agency? . . . . .  Yes  No
  - If "Yes", is coverage sought for such Title Agency as an additional insured on policy? . . . . .  Yes  No
  - Are at least 75% of the clients of said Title Agency also clients of the Applicant Firm? . . . . .  Yes  No
- In the past three (3) years, has any lawyer for whom coverage is sought acted as a title insurance agent?  Yes  No

APPLICANT UNDERSTANDS THE INFORMATION SUBMITTED HEREIN BECOMES A PART OF THE APPLICANT'S LAWYERS PROFESSIONAL LIABILITY INSURANCE APPLICATION AND IS SUBJECT TO THE SAME REPRESENTATIONS AND CONDITIONS.

**Sign and date in ink**

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Name of firm: \_\_\_\_\_