

Personal Errors & Omissions Insurance Coverage Extended Reporting Period Coverage Application

When to Purchase Extended Reporting Period Coverage

- **Retirement from your practice and the industry:** Retirement from the business of providing all and any “Professional Services” as defined within the Master Policy of Coverage including the surrender/termination of any licenses required for such Professional Services;
- **Permanent Disability:** The cessation of providing all and any “Professional Services” as defined within the Master Policy of Coverage due to permanent disability including the surrender/termination of any licenses required for such Professional Services;
- **Death:** Upon the death of the Insured Certificate Holder with such proof being provided by an authorized individual.

General Terms and Conditions Summary

1. **The purchase of Extending Reporting Period Coverage** is dependent upon holding current or expiring Personal Errors & Omissions Insurance through the Advocis Broker Services Sponsored Plan for a minimum prior period of 1 year;
2. **Extended Reporting Period Coverage Limits of Liability** may only be equal to or less than the Insured’s current or expiring Limit of Liability under the Advocis Broker Services Individual Sponsored Program;
3. **Purchase of Extending Reporting Coverage** must be made within 60 days of the expiry of your current coverage, permanent disability, or death.
4. **Purchasing Extended Reporting Period Coverage** does not increase your limit of insurance;
5. **Continuing coverage under the Extended Reporting Period Coverage** term is based on the Advocis Broker Services Master Policy in place at the time of Extended Reporting Period Coverage;
6. **Coverage is only provided for acts, errors and omissions**, and/or other Claims as defined within the Master Policy of Coverage prior to the Effective Date of the Extended Reporting Period Coverage term;
7. **Other terms and conditions may apply.** Please speak with your broker for further information and details specific to your situation and needs to determine the correct and appropriate Extended Reporting Period Coverage for your needs.

Application

First Name _____ Last Name _____
Mailing Address _____
City _____ Province _____ Postal Code _____
Work Telephone _____ Email _____
Current Certificate Number _____ Effective Date _____ Expiry Date _____
Expiring Premium _____ Current Limit of Liability _____

Province of residence and primary life license registration:

BC AB MB SK ON QC PEI NB NF NS YU NWT NU

Other Provinces in which you are life licensed:

BC AB MB SK ON QC PEI NB NF NS YU NWT NU

Important Note for Manitoba Life Licensees:

As per regulatory requirements of the Insurance Council of Manitoba you are automatically granted a five year Extended Reporting Period Coverage at no additional cost. This form/application must still be completed for underwriting and issuing of a certificate.

Please refer to the Advocis Broker Services Master Policy for all terms and conditions relating to the offering and purchase of Extended Reporting Period Coverage.

Application for Extended Reporting Period Coverage

Yes No **Option 1 – Automatic 2 Year ERP Period Only**

Expiring Premium	\$ _____	If you do not know your expiring premium please contact Advocis Broker Services Inc.			
Term Option	Rate	Premium	Provincial Sales Tax (ON: 8%; QC: 9%; MB: 8%; SK: 6%; NL: 15%)		Total
			Premium	Broker Fee	
2 Years	0%	\$0	\$0	\$	\$

Yes No **Option 2 – Purchase of 3, 4, or 5 Year ERP Period**

Expiring Premium	\$ _____	If you do not know your expiring premium please contact Advocis Broker Services Inc.			
Term Option	Rate	Premium	Provincial Sales Tax (ON: 8%; QC: 9%; MB: 8%; SK: 6%; NL: 15%)		Total
			Premium	Broker Fee	
<input type="checkbox"/> 3 Years	200%	0%	\$	\$	\$
<input type="checkbox"/> 4 Years	250%	0%	\$	\$	\$
<input type="checkbox"/> 5 Years	300%	0%	\$	\$	\$

Yes No **Option 3 – Purchase of Unlimited ERP Period**

Expiring Premium	\$ _____	If you do not know your expiring premium please contact Advocis Broker Services Inc.			
Term Option	Rate	Premium	Provincial Sales Tax (ON: 8%; QC: 9%; MB: 8%; SK: 6%; NL: 15%)		Total
			Premium	Broker Fee	
Unlimited	400%	0%	\$	\$	\$

Yes No **Option 4 – Manitoba Life Licensee 5 Year ERP Period**

Expiring Premium	\$ _____	If you do not know your expiring premium please contact Advocis Broker Services Inc.			
Term Option	Rate	Premium	Provincial Sales Tax (ON: 8%; QC: 9%; MB: 8%; SK: 6%; NL: 15%)		Total
			Premium	Broker Fee	
5 Years	0%	0%	\$	\$	\$

Payment Information

Total Amount _____

Credit Card VISA MasterCard AMEX

Cheque/Money Order

Card Number _____

Payable to Advocis Broker Services Inc.

Expiry Date _____

Card Holder Name _____

Signature _____

Date _____

Application Submission Instructions

Please send this completed and signed application (including all pages) to Advocis Broker Services Inc. along with payment to:

Mail: Advocis Broker Services Inc., 10 Lower Spadina Avenue, Suite 600, Toronto, ON M5V 2Z2

Email: info@absinc.ca

For additional information: 416.646.9888 • 877.646.9888 • Fax: 647.245.2227