



**Easy, affordable
professional
liability coverage
is just
a click away.**



Help Protect Your Firm's Financial Future.

Get the AICPA-Endorsed CPA Value Plan.

The Right Professional Liability Insurance Program for You and Your Firm

CPA Value Plan. It's no ordinary insurance plan. It's a broad professional liability program built around the unique needs of small CPA firms like yours with up to \$400,000 in annual revenue and up to 3 professionals.

Easy and Affordable Coverage — Available Online

With the CPA Value Plan, you won't have to pay for the mistakes of large firms. Unlike other providers, our rates are based solely on the loss experience of smaller firms, making high quality coverage affordable for you.

To see for yourself, log on to www.cpai.com/mitchellandmitchell and complete our quick and easy online application process. **You'll receive a free, real-time, no-obligation quote in minutes — with the option to purchase coverage online.** Plus, when you apply, you'll be able to take advantage of premium financing opportunities to make competitive rates even more manageable.

Coverage for You and the Services You Provide

Endorsed by the AICPA, the CPA Value Plan provides broad coverage for general accounting and consulting services, including:

- Tax planning and preparation
- Personal financial planning
- Bookkeeping
- Compilations
- Reviews
- Audits
- Management advisory services
- EDP services and system consultations
- General business planning
- Litigation support services

**Purchase coverage online at www.cpai.com/mitchellandmitchell.
Apply for your free, no-obligation quote today!**

Professional Liability Insurance for Accountants Like You

Created with accountants like you in mind, the CPA Value Plan rewards you with broad coverage and valuable benefits.

Coverage Features

- Choice of limits to fit your firm's structure
- Choice of deductibles to meet your firm's needs
- Defendant's reimbursement of \$50 per hour for wages lost due to required court attendance if CNA, the Plan underwriter, requires you to attend
- Covered attorney and court costs of a regulatory inquiry of your firm up to \$10,000
- Your firm's complete staff is covered, including per diems
- Prior acts coverage for qualified firms
- No claim settled without your written consent
- Innocent partners coverage for those who were not aware of fraud
- Trustee coverage for your firm's personal trust clients is included
- Premium financing options available

Program Benefits

- Simple online application and renewal processes
- Competitive rates based on the loss experience of smaller firms
- Cost savings and premium credit rewards for responsible practice management
- Premium financing options
- Support via the AICPA oversight committee, a group of practicing CPAs who continually benchmark the Program against your needs
- Exceptional customer service
- Risk Management guidance from accountants professional liability experts

Go to www.cpai.com/mitchellandmitchell

today. It's the fast, easy way to
make sure your firm is
getting the best value in
professional liability.

Risk Management Services to Reduce Your Exposure

As an added benefit, you'll be enrolled in the AICPA Professional Liability Risk Management Program, which will help you identify high-risk activities and implement practice management strategies to minimize your exposure to professional liability lawsuits.

The Risk Management Program provides access to:

The Online Policyholder Resource Center at cpai.com

— This area will give you access to online policy renewal, practice management guides, claim information, and risk management advice.

CNA Risk Management/Claims Hotline — Talk to risk management professionals about methods to help reduce malpractice risk and resources to assist in your firm's engagements.

Engagement Letter Brochure — You'll have access to the Program's Engagement Letter Brochure, which provides valuable information about how to prepare, draft, and use client engagement letters. And now the brochure includes templates to assist you in drafting a variety of engagement letters.

Record Retention Guide — This essential risk management handbook will provide best practices in retaining engagement records and responding to requests for records.

Training Opportunities — The Program's inexpensive risk management seminar and self-study course will enable you to earn CPE credit and up to a significant 7.5% premium credit each year — for three consecutive years!

Complimentary Newsletters

— Policyholders receive our semi-annual newsletter, *The Risk Management Resource*, which delivers information about minimizing liability risks, seminars, and new products and services.

The Online Risk Management Resource Area at cpai.com

— You can search through an online library of useful articles, including relevant case scenarios.

Exceptional Protection

You won't find a professional liability insurance program like this anywhere else. An easy application process, broad coverage, and valuable benefits make the CPA Value Plan a necessary addition to your practice. Invest in peace of mind and apply today — visit www.cpai.com/mitchellandmitchell or call (800) 562-4272.





**Now you can
afford the
professional
liability coverage
you need and
deserve.**

Malpractice claims against accountants are a real problem. And yes — like it or not — a claim could happen to you, even if you do nothing wrong. To protect yourself — and your firm — you need professional liability insurance that stands up to today's contentious times. You need the AICPA-endorsed CPA Value Plan.



CPA Value Plan Designed for CPAs Like You

PART OF THE 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 employees and clients.

Brought to you by:



The CPA Value Plan is brought to you by Aon Insurance Services, the AICPA Insurance Programs Administrator since 1974. Aon Insurance Services has earned a reputation for developing innovative programs and providing consistently superior customer service.

Underwritten by:



The AICPA CPA Value 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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