




Solid. Reliable.
Focused on the Accounting Profession.
The AICPA-Endorsed Premier Plan.



Mitchell & Mitchell
Insurance Agency, Inc.



MORE THAN 24,000 ACCOUNTING
FIRMS HAVE HELPED MAKE THE
AICPA PROFESSIONAL LIABILITY
INSURANCE PROGRAM
THE ACCOUNTING PROFESSION'S TOP
CHOICE IN MALPRACTICE COVERAGE.

The AICPA-endorsed Premier Plan can help reduce your firm's exposure to malpractice suits through our innovative risk management program, so your firm can focus on what it does best—help businesses and individuals succeed.

**The Premier Plan is
Endorsed by the AICPA—
Your Assurance of Quality**

The AICPA-endorsed Premier Plan is much more than an insurance plan. It's a partnership. The combined efforts of a committee of practicing CPAs and the professionals at Aon and CNA, the Plan's underwriter, have developed a plan that's focused on the unique needs of accounting firms across America.

Quality Benefits at Affordable Rates

The Premier Plan gives your firm access to a wide range of liability limits ranging from \$100,000 to \$10 million for qualified firms. And, the Plan provides coverage for:

- Personal trust services
- Personal financial planning (PFP)
- Tax planning and preparation
- Compilation
- Audit
- Computer software and hardware services
- General accounting services, and more



Give Your Firm the High Quality Coverage it Needs...



We're focused on tailoring our coverages to the needs of America's accounting professionals. That's why the Premier Plan is endorsed by the AICPA. It's also why accounting firms have made it the top accountants professional liability insurance program in the country.

Accounting firms like yours play a vital role in the financial success of America's businesses, families, and individuals. Our job is to provide high quality accountants professional liability insurance to help protect your firm's ability to provide the professional services both businesses and people need to grow and prosper.

Everything about the Premier Plan—from coverages to rates, to our innovative risk management program and our dedication to responsive service and claims resolution—is designed with one goal in mind: to allow your firm to focus on what it does best. We've been dedicated to this goal for more than 36 years, and we continue to work at it every day.

Coverage to Meet Your Firm's Needs

The Premier Plan is incredibly flexible, offering optional coverages, including:

REGISTERED REPRESENTATIVES

Covers registered representatives for the sale of securities, eliminating the need to purchase a separate policy from your broker dealer.

LIFE INSURANCE AGENTS

Covers those in your firm who are agents or brokers for the placement of annuities or life, accident, health and/or disability insurance policies.

NOT-FOR-PROFIT DIRECTORS & OFFICERS DEFENSE COST REIMBURSEMENT

Reimburses defense costs for CPAs who act as directors or officers in not-for-profit organizations.

BODILY INJURY COVERAGE

Affords coverage for claims alleging bodily injury. Such coverage is of particular importance to firms providing CPA ElderCare Services.

EMPLOYEE DISHONESTY

Provides coverage for losses sustained due to employee dishonesty; for example, bookkeepers handling client monies.

with the AICPA-Endorsed Premier Plan.



Cost-Reducing Premium Credits

You can reduce the cost of your firm's coverage through premium credits you can earn by:

- Participating in risk management training offered by the Program
- Using engagement letters on a regular basis
- Receiving an unqualified peer review
- Remaining claims-free

Help Decrease the Risk of Malpractice Suits

The Premier Plan's Risk Management Program is designed to help your firm reduce the risk of malpractice suits. Professionals from your firm can attend a live seminar or participate in a webcast for

an additional fee*. When firm professionals attend the Program's risk management seminar or complete the webcast, the firm can earn premium credits up to 7.5% for three consecutive years. Our Program also distributes newsletters and alerts to inform you about current professional liability issues. And, through the CNA Risk Management/Claims Hotline, you'll receive advice on drafting engagement letters, client acceptance, and risk avoidance strategies from risk management professionals dedicated to serving the accounting profession.

*Seminar and webcast availability and cost subject to schedule. View schedule online at www.cpai.com.

Exceptional Service from Two of America's Most Respected Names in Insurance

CNA and Aon are committed to providing your firm with superior professional liability coverage. From getting a quote to filing a claim, you can expect the outstanding service your firm deserves.

The Premier Plan is underwritten by Continental Casualty Company, one of the CNA companies. CNA has been providing insurance for over 100 years and is the largest underwriter of accountants professional liability insurance in the United States.

CNA has a staff of experienced claims and risk management professionals dedicated to serving the accounting profession and handling your claim fairly, promptly, and efficiently. CNA is rated A (Excellent) by A.M. Best Company, a leading national rating service for the insurance industry.

Aon Insurance Services has been the National Administrator for the AICPA Professional Liability Insurance Program since 1974. With a reputation for outstanding customer service and a proven track record of serving the insurance needs of accounting professionals, you can count on dedicated resources committed to serving your interests.

The Quality is clear to See.



It's Easy to Switch to the AICPA Premier Plan

Get a Premium Estimate for your Premier Plan coverage.

Apply right away.

Go to www.mitchellandmitchell.com and download an application. Then submit your completed application by:

- Mailing your completed application to the address provided.
- Faxing your completed application to: 1-800-247-5624

Or, call toll-free 1-800-562-4272 and a plan representative will take your information over the phone. An AICPA Plan Representative will call you and provide a no-obligation quote.

We See the Value of the CPA Profession. You'll See the Quality of the Premier Plan. Give Your Firm Coverage it Can Count on, Today and Tomorrow.

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 employers and clients.

Brought to you by:



The Premier Plan is brought to you by Aon Insurance Services*, the AICPA Professional Liability Insurance Program Administrator since 1974. Aon Insurance Services has earned a reputation for developing innovative programs and providing consistently superior customer service.

Underwritten by:



The Premier 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 36 years.

One or more of the CNA companies provide the products and/or services described. The information is intended to present a general overview for illustrative purposes only. It is not intended to constitute a binding contract. Please remember that only the relevant insurance policy can provide the actual terms, coverages, amounts, conditions and exclusions for an insured. All products and services may not be available in all states and may be subject to change without notice. CNA is a service mark registered with the United States Patent and Trademark Office. Copyright © 2007 CNA. All rights reserved.

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