



## ***Accounting Professionals What To Do If You Have a Claim***

**Like you, we hope that your firm will never experience a claim. But if you do, follow these tips and let our renowned claims professionals work on your behalf**

### **Do:**

#### **Consult your policy.**

It will answer many of your questions.

#### **Immediately notify Insight.**

Claims and potential claim circumstances need to be reported in writing. You can reach Insight by fax at 888/447-6289 or 630/208-7550. Our phone numbers are 800/447-4626 or 630/208-1900. The email address for claim reporting is [claims@insightinsurance.com](mailto:claims@insightinsurance.com). You may also want to notify your insurance agent.

#### **Make sure your claim report includes complete information.**

You should include the suit papers or demand letter, a narrative describing the facts and circumstances of the claim, a copy of relevant files and any correspondence to or from the client concerning the claim.

#### **Promptly and completely secure the physical integrity of your files, including work papers, reports and computer records.**

Only those who absolutely need files related to the claim should have access to them.

#### **Provide the Insurance Company representative with all the facts, including the strengths and weaknesses of your firm's position.**

A thorough understanding of all facts will allow us to plan the most effective defense against a claim. Your attorney, although selected by the Insurance Company, represents you and your firm - not the Insurance Company.

#### **Stay involved in the defense.**

Responding quickly to attorney's requests and inquiries as well as attending all necessary conferences and meetings, will go a long way in obtaining a favorable result.

### **Don't:**

#### **Don't wait to report a potential claim.**

Our claims personnel will be able to advise you on the best course of action. Taking the proper steps and precautions before a suit is filed increases your chances of a positive outcome.

#### **Don't admit liability or attempt to settle any claim without the Insurance Company's approval.**

Doing so may forfeit your coverage.