

Umbrella

Form #	Form Edition Date	Name of Form/Endorsement	Mandatory/Optional	Comments and Rules
UMBRELLA PRIME MANDATORY FORMS				
81499	10-04	Umbrella Prime - Lex Commercial Umbrella Declaration Page	M	
81500	11/09	Umbrella Prime - Lex Commercial Umbrella Liability Policy with CrisisResponse	M	
87043	11/04	Commercial General Liability Limitation	M	Will make Umbrella excess follow-form. It will reduce the # of exclusions on the umbrella, if it is already excluded on the underlying.
91222	04/13	Policyholder Notice - Commission	M	See GL Forms list for copy of endorsement
78113	05/13	placeholder: ADDENDUM TO THE DECLARATIONS (SIGNATURE PAGE)	M	See GL Forms list for copy of endorsement
96556	1/15	Policyholder Disclosure Notice of Terrorism Insurance Coverage	M	See GL Forms list for copy of endorsement
89644	06/13	Economic Or Trade Sanctions Condition Endorsement	M	See GL Forms list for copy of endorsement
99497	6/08	Violation of Economic or Trade Sanctions Condition Amendment Endorsement	M	removes built in Economic Sanctions wording that is replaced with endt 89644 (6/13)
80477	07/02	Schedule of Underlying Insurance	M	
118632	1/15	Access or Disclosure of Confidential or Personal Information Exclusion Endorsement	M	
83049	3/06	Act of Terrorism Self Insured Retention Endorsement	M	
80394	09/03	Anti Stacking Endorsement	M	
80396	07/02	Athletic Activities Exclusion	M	
80411	01/04	Cross Suits Exclusion	M	
80417	07/02	D&O Liability Exclusion	M	
80468	07/02	Punitive and Non-Monetary Relief Exclusion	M	
80419	07/02	Employee Benefits Liability Exclusion (do not attach if providing EBL on the primary)	M	Do not attach if providing EBL on primary. Attach EBL form
82449	06/03	Fungus Exclusion	M	
83060	09/03	Communicable Disease Exclusion	M	
80479	02/03	Silica Exclusion	M	
86407	08/04	Sports Leisure Exclusion	M	
86457	08/04	Firearms Exclusion	M	
86558	08/04	Discrimination Exclusion	M	
86471	02/06	Lead Exclusion	M	
87224	12/04	Liquor Liability Exclusion	M	Mandatory unless providing it through the umbrella is required.(Exception is only approved for Restaurant Program)
80463	07/02	Personal Injury Follow Form	M	
83093	05/05	Professional Liability Exclusion	M	
83094	09/03	Radioactive Matter Exclusion	M	
83080	09/03	Garagekeepers Legal Liability Exclusion	M	
83096	09/03	Specified Operations Exclusion	M	Use to exclude operations/exposures where there is an underlying GL exclusion. Unless there is an umbrella specific exclusion endorsement.
83075	09/03	Fetal Alcohol Syndrome and Fetal Alcohol Effects Exclusion	M	
113512	3/13	Physical Abuse, Sexual Abuse or Molestation Exclusion Endorsement	M	
80479	02/03	Silica Exclusion	M	
95117	07/07	Armed Security Guard Exclusion	M	
95310	07/07	Products Completed Operations Hazard Redefined	M	
105907	07/10	Total Pollution Exclusion With Building Equipment and Hostile Fire Exception	M	
117617	9/14	Crisis Response Exclusion	M	
83070	9/03	Employers Liability Exclusion	M	Mandatory unless writing over primary EL.
90991	05/06	Employers Liability Stop Gap Exclusion	M	Mandatory when writing over EL in ND, OH, WA & WY
82610	05/12	Uninsured – Underinsured Auto (For Owned Vehicles Only)	M	Updated form will be provided - States: FL, LA, NH, VT & WV
PLUS ALL REQUIRED STATE AMENDATORY ENDORSEMENTS				
UMBRELLA PRIME OPTIONAL FORMS				
86428	02/09	Aircraft Products And Grounding Exclusion	O	
80399	7/02	Auto Liability Exclusion	O	
80488	07/02	Subsidence Exclusion	O	
81583	04/07	Retained Limit Amendment	O	
80431	07/02	Foreign Liability Exclusion	O	
80432	07/02	Foreign Liability Follow Form	O	
89484	06/05	Specified Entity(ies) Exclusion	O	
83097	9/03	Specified Product Exclusion	O	Use as needed if products is excluding on underlying policy.
81581	02/03	Nonconcurrency Endorsement	O	
83085	09/03	Liquor Liability Limitation Endorsement	O	Attach if offering liquor through the umbrella. (Only approved for Resturant program)
83073	4/07	Employee Benefits FF (claims made)	O	
80454	07/02	Notice of Occurrence	O	

4/17/2015

Form #	Form Edition Date	Name of Form/Endorsement	Mandatory/Optional	Comments and Rules
Mandatory Forms				
CG 21 16	04-13	Exclusion for Professional Services	Mandatory	
CG 21 32	05 09	Communicable Disease Exclusion	Mandatory	
CG 21 35	10-01	Exclusion - Cov C - Medical Payments	Mandatory	
CG 21 36	03 05	Exclusion - New Entities	Mandatory	
CG 21 39	04-13	Contractual Liability Limitation	Mandatory	
CG 2147	12/07	Employment Related Practices	Mandatory	
CG 24 07	01 96	Products/Completed Operations Hazard Redefined	Mandatory	
PRG 3780	02-15	Firearms Exclusion	Mandatory	
PRG 3779	02-15	EXCLUSION - DELIVERY SERVICES	Mandatory	
PRG 3782	02-15	Policy Exclusions Amendatory end (Liquor & CGL) - excludes Physical abuse, sexual abuse or molestation - drinking games - penalties	Mandatory	
PRG 3778	02-15	EXCLUSION-ATHLETIC OR SPORTS PARTICIPANTS	Mandatory	
PRG 3726	04 14	Cross Suits Exclusion	Mandatory	
78713	06 13	LEXINGTON SIGNATURE PAGE	Mandatory	
		ANYTIME THERE IS A KNOWN INDIANA EXPOSURE (Payroll/Location):	Mandatory	
115924	10-13	Indiana Amendatory - Definition of Pollutants (see '1' below)	Mandatory	
84337	04-04	(1) When the insured is Headquartered in a state other than Indiana but has known exposure (payroll, property exposures), include the following policyholder notice): Policyholder Notice - Amendatory Endorsement. Include the following wording: "We are amending your policy by adding Endorsement 115924 (10/13), Indiana Amendatory Endorsement. This endorsement restricts the insurance you are provided by excluding coverage for all pollution exposures in the state of Indiana and/or for which Indiana law applies".	Mandatory	Except IN
84338	04-04	Alcohol Health Exclusion	Mandatory	
58332	08-07	Lead Exclusion	Mandatory	
62898	07-12	Radioactive Matter Exclusion	Mandatory	
64004	07-12	ERISA Exclusion	Mandatory	
78689	07-03	Fungus Exclusion	Mandatory	
89644	06-13	Economic Sanctions Endorsement (OFAC)	Mandatory	
91222	04-13	Policyholder Notice - Commission	Mandatory	None
96556	02-08	Policyholder Disclosure Notice of Terrorism Insurance Coverage	Mandatory	
CG 0001	04-13	Commercial General Liability Coverage Form	Mandatory	
CG 2106	05-14	Exclusion - Access or Disclosure of Confidential or Personal Information (Coverage B only)	Mandatory	New - ISO mandatory.
CG 2146	07-98	Abuse or Molestation Exclusion	Mandatory	(Not required if Policy Exclusion Amendatory end is used.
CG 2147	12-07	Employment Related Practices Exclusion	Mandatory	
CG 2149	09-99	Total Pollution Exclusion	Mandatory	
IL 0003	09-08	Calculation of Premium	Mandatory	
IL 0017	11-98	Common Policy Conditions	Mandatory	
IL 0021	09-08	Nuclear Exclusion	Mandatory	
PRG 2023	0705	SERVICE OF SUIT CONDITION	Mandatory	
PRG 3714		Asbestos and Silicosis Exclusion	Mandatory	

GL-Stop Gap-EPLI-Crisis-HNOA

		Optional Foms		
99813	08-14	Crisis Response	Optional	
107967	02-11	Corporate Identity Theft (CIP)	Optional	
117615	08 14	General Liability Extension Endorsement - Includes Knowledge of Occurrence - Liberalization clause - Non-Owned Watercraft exclusion - Notice of occurrence - Supplementary Payments - Unintentional Failure to Disclose Hazards	Optional	
51767	04-02	Employee Benefits Liability	Optional	
110325	01 14	Employment Practices Liability	Optional - Must offered to all insureds in program. Insured can then "OPT-OUT" of purchasing coverage.	
110332	01 14	Employment Practices Liability Supplemental Application	Optional	Mandatory if EPL is provided.
110341	01 14	EPL Supplemental Extended Reporting Period end	Optional	
CG 2165	12-04	Total Pollution Exclusion with Building, HVAC, and Hostile Fire Exception	Optional	
CG 00 33	04-13	Liquor Liability Coverage Form	Optional	
CG 04 36	04-13	Limited Product Withdrawal Expense	Optional	
61712	08/07	Additional Insured - when required by agreement or contract	Optional	
CG 20 11	04-13	Additional Insured - Manager or Lessors of Premises	Optional	
CG 20 18	04-13	Additional Insured - Mortgagee, assignee or reciever	Optional	
CG 2029	04-13	Additional Insured - Grantor of Franchise	Optional	
CG 20 34	13-Apr	Additional Insured - Lessor of Leased Equipment - Automatic Status when required by leasing agreement	Optional	
CG 2026	04-13	Additional Insured - Designated Person or Organization	Optional	
CG 20 28	04-13	Additional Insured-Lessor Of Leased Equipment	Optional	
CG 21 44	07 98	Limitation of Coverage to Designated Prem or Projects.	Optional	
CG 21 53	01-96	EXCLUSION-DESIGNATED ONGOING OPERATIONS	Optional	
CG 2155	09-99	Total Pollution Exclusion with Hostile Fire Exception	Optional	
CG 25 04	05-09	DESIGNATED LOCATION(S) GENERAL AGGREGATE LIMIT	Optional	
MS RS 03	03-07	Non-owned & Hired Car Automobile	Optional	Only use if no "owned auto" and attach to GL
73187	09 -03	DEDUCTIBLE LIABILITY INSURANCE (DEFENSE COST WITHIN DEDUCTIBLE)	Optional	
CG 21 66	04 13	Exclusion - Volunteer Workers	Optional	
PRG 3781	02-15	Exclusion - Security Operations or Activities	Optional	
CG 0442	11-03	Stop Gap Coverage -WA	Optional	
CG 0440	11-03	Stop Gap Coverage -ND	Optional	
CG 0444	11-03	Stop Gap Coverage -WV	Optional	
CG 0441	12-04	Stop Gap Coverage -OH	Optional	
		PLUS ALL REQUIRED STATE AMENDATORY ENDORSEMENTS		

As of 4-17-15

Property

Form #	Form Edition Date	Name of Form/Endorsement	Mandatory/Optional	Comments and Rules
91222 (04/13)		Policyholder Notice - Commission	Mandatory	None
Overall Dec		Commercial Property Coverage Part Declarations	Mandatory	
IL 0017 (11/98)		Common Policy Conditions – ISO CPP (only)	Mandatory	
89644 (06/13)		Economic Sanctions Endorsement (OFAC)	Mandatory	
96553 (04/08)		Policyholder Disclosure Notice of Terrorism Insurance Coverage	Mandatory	
102214 (06/10)		Georgia Diminution of Value Exclusion	Mandatory	Mandatory if GA Locations
97100 (05/08)		Commercial Property Conditions	Mandatory	
97101 (05/08)		Common Policy Conditions (Use IL 0017 for Package Policies)	Mandatory	
97069 (03/08)		Supplemental Declarations	Mandatory	
97064 (03/08)		Business and Personal Property Cov Form	Mandatory	
97072 (05/08)		Cause of Loss – Special Form	Mandatory	
100381 (12/08)		Cov for Loss to the Undamaged Portion of Bldg	Mandatory	
100380 (12/08)		Ordinance or Law Amendatory Endorsement	Mandatory	
99079 (05/08)		Exclusion of Loss Due to Virus or Bacteria	Mandatory	
		OPTIONAL		
97070 (05/10)		Business Income (and Extra Expense) Coverage Form	Optional	
CP 1065 (10/12)		Flood Coverage Endorsement	Optional	
CP 1045 (10/12)		Earthquake and Volcanic Eruption (Sub Limit Form)	Optional	
97065 (04/08)		Equipment Breakdown Exclusion	Optional	(mandatory when not providing Equipment breakdown coverage)
97081 (04/08)		Equipment Breakdown-Other Conditions Endt	Optional	
90610 (11/08)		Windstorm or Hail Deductible Endorsement	Optional	
CP 1054 (06/07)		Windstorm or Hail Exclusion	Optional	
97036 (02/08)		Upgrade to Green	Optional	
110286 (06/12)		Ordinary Payroll Exclusion	Optional	
110358 (05/12)		Supplemental Dec – Limit/Deductible Changes	Optional	Upon referral to Program Manager
106360 (09/10)		Surface Water Amendatory	Optional	
115262 (4/14)		Food Contamination and Communicable Disease	Optional	
106361 (09/10)		Limited Coverage for Virus and Bacteria	Optional	
CP 1036 (10/12)		Limitations on Coverage for Roof Surfacing	Optional	
110242 (02/12)		Property Coverage Amendatory	Optional	
PRG9260	05/14	Restaurant Restaurant Enhancement	Optional	
PRG 9259	05/14	Wine Valuation Endorsement	Optional	
CP 10 32	08 08	Water Exclusion Endorsement	Optional	
CP 12 18	10-12	Loss Payable Provisions	Optional	

4/17/2015

Crime

Form #	Form Edition Date	Name of Form/Endorsement	Mandatory/Optional	Comments and Rules
CRDS 01	(08/13)	Crime & Fidelity Part Declarations	Mandatory	
CR 0021	(08/13)	Commercial Crime Coverage Form – Loss Sustained Form	Mandatory	
CR 2028	(08/07)	Add Protective Devices or Services	Optional	
CR 3531	(08/07)	Provide Sublimits for Money, Securities or Checks	Optional	
CR 2501	(10/10)	Exclude Designated Persons or Classes	Optional	
CR 3501	(08/13)	Exclude Specified Property	Optional	
CR 2031	(08/13)	Include As Joint Insureds	Optional	
CR 0408	(08/13)	Employee Theft Name or Position schedule	Optional	

AS OF 4/17/15

FORM #	INLAND MARINE FORM TITLE	LIMITATIONS
MANDATORY ATTACHMENTS – ALL POLICIES		
91222 (04/13)	Policyholder Notice – Commission	None
CL 0101 (04/13)	Common Policy Conditions (AAIS)	
89644 (06/13)	Economic Sanctions Endorsement (OFAC)	
96556 (01/15)	Policyholder Disclosure Notice of Terrorism Insurance Coverage	
102214 (06/10)	Georgia Diminution of Value Exclusion	Mandatory if GA Locations
108087 (05/12)	Common Policy Conditions Endorsement	Attach whenever both ISO and AAIS forms are used on a policy
PRG 2023 (07/05)	Service of Suit Condition	SURPLUS LINES ONLY
PLUS ALL REQUIRED STATE AMENDATORY ENDORSEMENTS		
INLAND MARINE – OPTIONAL FORMS		For each IM Coverage - there are additional forms and endorsements available when needed for specific accounts. Normally they will be available on a referral basis. If there is a program that requires such forms or endorsements, form information may be provided.
<u>TRANSPORTATION</u>		
IM 7250 (04 04)	Transportation Coverage Form	
IM 7255 (01 12)	Schedule of Coverages - Transportation	
IM 7271 (05 07)	Vehicle Alarm Endorsement	
IM 7261 (01 12)	Refrigeration Breakdown Endt - other transportation forms	