Form Name	Form No. Edition Date	Form Type	Mandatory Optional	Restricts Broadens Other	Rate or Premium Impact	Form Description
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE POLICY	GC WF CPA 00 01 0426	POL	Mandatory	Broadens	Yes	Insurance Policy for Accountants and Consultants Professional Liability .
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY PROFESSIONAL LIABILITY DECLARATIONS	GC WF CPA DEC 01 0426	DEC	Mandatory	Other	No	Accountants and Consultants Professional Liability Declarations
ACCOUNTANTS & CONSULTANTS - SCHEDULE	GC WF CPA FS 01 0426	OTHER	Mandatory	Other	No	Accountants and Consultants Professional Liability forms schedule
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Additional Insured Endorsement	GC WF CPA 01 01 0821	ENDT	Optional	Broadens	No	Used to add an Additional Insured to the policy
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Affiliation as Additional Insured Endorsement	GC WF CPA 01 02 0526	ENDT	Optional	Broadens	No	Used to extend coverage if the firms request coverage for membership in an affiliation or association.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Affiliation or Association Endorsement	GC WF CPA 01 03 0821	ENDT	Optional	Broadens	No	This optional affiliation endorsement is granted to members of an approved international affiliation of CPA firms.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Amendatory Endorsement	GC WF CPA 01 04 0526	ENDT	Optional	Other	No	Used to make amendments to the Accountants & Consultants PL Policy
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Anti-Stacking of Limits Endorsement	GC WF CPA 01 05 0526	ENDT	Optional	Other	No	This endorsement is used where CPA firms have more than one primary professional liability policy
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Broadcasters Liability Endorsement	GC WF CPA 01 06 0526	ENDT	Optional	Broadens	No	This optional endorsement is used for CPA firms that participate in media events and require specific coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Cancellation Endorsement	GC WF CPA 01 07 0821	ENDT	Optional	Other	Yes	Used to cancel the policy and return premium
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Defense Expenses Outside of the Limits of Liability Endorsement	GC WF CPA 01 08 0526	ENDT	Optional	Broadens	Yes	This endorsement makes defense expenses outside of the policy limits.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Discrimination Complaint Endorsement	GC WF CPA 01 10 0526	ENDT	Optional	Broadens	No	Provides coverage for defense expenses due to a Discrimination Complaint
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Extended Reporting Period (Death or Disability) Endorsement	GC WF CPA 01 11 0821	ENDT	Optional	Broadens	No	This endorsement is used to issue a free extending reporting period for insureds that have died or become disabled
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Extended Reporting Period (Individual Retirement) Endorsement	GC WF CPA 01 12 0821	ENDT	Optional	Broadens	No	This endorsement is used to issue a free extending reporting period for insureds that have retired.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Extended Reporting Period (Reinstated Limits) Endorsement	GC WF CPA 01 13 0821	ENDT	Optional	Broadens	Yes	This endorsement is used to reinstate the annual aggregate limit of liability at the expiration of the policy term for those insureds that wish to refresh the limit of liability before exercising their rights to an extended reporting period.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Extended Reporting Period (Revised ERP) Endorsement	GC WF CPA 01 14 0526	ENDT	Optional	Broadens	Yes	This endorsement is used to revise the length of an extended reporting period endorsement.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Extended Reporting Period (Standard) Endorsement	GC WF CPA 01 15 0526	ENDT	Optional	Broadens	Yes	Endorsement used to issue an extending reporting period as stated in the policy
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Fiduciary Endorsement	GC WF CPA 01 16 0526	ENDT	Optional	Broadens	Yes	This optional endorsement is used where CPA firms act as a Fiduciary for a benefit plan
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - General Change Endorsement	GC WF CPA 01 17 0526	ENDT	Optional	Other	Yes	Use to make a variety of changes to the form due limit/date/deductible, etc., requested changes
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - General Counsel Endorsement	GC WF CPA 01 18 0526	ENDT	Optional	Broadens	No	This optional endorsement specifically names an Insured's in-house counsel, general counsel, or inernal attorney.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Identity Theft Sublimit Endorsement	GC WF CPA 01 20 0526	ENDT	Optional	Restricts	No	This optional endorsement add coverage for legal liability arising from loss of client records that results in theft of identity.Provides a submlimit for Identity Theft
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Lateral Hire Coverage Endorsement	GC WF CPA 01 23 0821	ENDT	Optional	Broadens	Yes	This optional endorsement is used to add coverage for individuals for prior acts while they were employed by another CPA firm but do not have tail coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Life Insurance Agent (Excess) Endorsement	GC WF CPA 01 24 0526	ENDT	Optional	Broadens	Yes	This endorsement used for firms with Life Insurance Agent exposure and requires additional coverage over and above any separate coverage, excess over a coverage already in place by the insured or an insurance agency

ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Life Insurance Agent Endorsement	GC WF CPA 01 25 0526	ENDT	Optional	Broadens	Yes	This endorsement used for firms with Life Insurance Agent exposure and requires additional coverage over and above any separate coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Maintenance Deductible Endorsement	GC WF CPA 01 26 0526	ENDT	Optional	Restricts	Yes	Issued if a deductible with an aggregate is selected. Provides language on what part of deductible applies against the aggregate deductible.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Managed Aggregate Limit (Multi-Year) Endorsement	GC WF CPA 01 27 0526	ENDT	Optional	Other	Yes	This optional endorsement offers a multi-year option by stretching the aggregate limit of liability over 24 months
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Management Liability Endorsement	GC WF CPA 01 28 0526	ENDT	Optional	Broadens	Yes	This optional endorsement provides Management Liability coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Modified Deductible Endorsement	GC WF CPA 01 29 0526	ENDT	Optional	Other	Yes	This optional deductible endorsement is available to firms that require this endorsement to match their current insurer's policy.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Outside Organization Directors & Officers Endorsement	GC WF CPA 01 30 0526	ENDT	Optional	Broadens	Yes	This endorsement is for an optional extension for CPA firms that require this additional Outside Directorships coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Part-Time Legal Services Endorsement	GC WF CPA 01 31 0526	ENDT	Optional	Broadens	No	This optional extension endorsement is available for CPA firms that also practice as a law firm and require additional coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Part-Time Practice Endorsement	GC WF CPA 01 32 0526	ENDT	Optional	Broadens	No	This optional endorsement offers coverage for moonlighting or part-time CPAs.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Public Companies Accounting Oversight Board (PCAOB) Investigation Endorsement	GC WF CPA 01 33 0526	ENDT	Optional	Restricts	Yes	This optional endorsement restricts PCAOB Investigations to a $50k sublimit to firms that are registered with the PCAOB.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Prior Acts Limitation Endorsement	GC WF CPA 01 34 0821	ENDT	Optional	Restricts	Yes	This endorsement is used to restrict coverage for prior acts when adding acquired entities mid-term or to match the prior acts limitations dates on competitors' policies
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Prior and Pending Litigation Endorsement	GC WF CPA 01 35 0526	ENDT	Optional	Restricts	No	Use for a new account to ensure that all claims have been notified and no coverage exists.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Privacy and Network Security Covered Acts Endorsement	GC WF CPA 01 36 0426	ENDT	Optional	Other	No	This endorsement provides for $50K limit for coverage for claims arising from a privacy act or network security act.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Real Estate Agent Endorsement	GC WF CPA 01 37 0526	ENDT	Optional	Broadens	Yes	This endorsement is for an optional extension for CPA firms that require this additional Real Estate Agents coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Registered Representative Endorsement	GC WF CPA 01 39 0526	ENDT	Optional	Broadens	Yes	This endorsement used for firms with Personal Financial Planning exposure and requires additional coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Reinstatement Endorsement	GC WF CPA 01 40 0821	ENDT	Optional	Other	No	This endorsement is used to reinstate policy if it has been cancelled due to non-payment of premium
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Registered Investment Advisor Endorsement	GC WF CPA 01 41 0526	ENDT	Optional	Broadens	No	This optional endorsement is used where CPA firms act as a Registered Investment
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Sarbanes-Oxley Endorsement	GC WF CPA 01 42 0526	ENDT	Optional	Restricts	No	This optional exclusion provides defense coverage for CPA firms with public audit exposure for fines and penalties that arises from Sarbanes-Oxley Act of 2002
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Selection of Counsel Endorsement	GC WF CPA 01 43 0526	ENDT	Optional	Other	No	This optional endorsement is used by CPA firms with larger assumed risk (usually deductibles over $100,000) that use defense appoint counsel pre-approved by the insurer and administer claims within the deductible
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Self-Insured Retention Endorsement	GC WF CPA 01 44 0426	ENDT	Optional	Other	No	This optional endorsement is used by CPA firms with larger assumed risk (usually deductibles over $100,000)
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Single Engagement Excess Limit of Liability Endorsement	GC WF CPA 01 45 0526	ENDT	Optional	Broadens	Yes	This optional endorsement is for CPA firms that require an increased limit for a specific engagement

ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Social Engineering and Fraudulent Instruction Endorsement	GC WF CPA 01 46 0526	ENDT	Mandatory	Broadens	No	This is a conditional mandatory endorsement, issued to any firm/policy involved in funds transfers and other financial transactions. It clarifies that coverage includes damages due to fraudulent fund transfer instructions and other social engineering perils
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Split Retroactive Date Endorsement	GC WF CPA 01 47 0526	ENDT	Optional	Other	Yes	Provides a different policy limit and/or deductible option for claims that occur after the specified retroactive date. Loss occurrences before the retroactive date are covered by the limits/deductibles on the declarations page
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Subpoena Cap Endorsement	GC WF CPA 01 48 0526	ENDT	Optional	Restricts	No	Provides a specific limit for Disciplinary Proceeding and Subpeona Expense addition coverages.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Tax Preparers and Public Accountants Endorsement	GC WF CPA 01 49 0526	ENDT	Optional	Restricts	Yes	This optional endorsement limits coverage to services as a tax preparer as defined. The premium for this change is calculated by cutting the standard ratings in half.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Trust Liability Endorsement	GC WF CPA 01 50 0526	ENDT	Optional	Broadens	Yes	This endorsement is for an optional extension for CPA firms that require coverage for services provided as a Trustee.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Cyber Exclusion Endorsement	GC WF CPA 02 01 0426	ENDT	Optional	Restricts	No	This endorsement excludes Cyber coverage and is attached whenever the insured has separate Cyber coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Excluded Claims Endorsement	GC WF CPA 02 02 0526	ENDT	Optional	Restricts	No	This endorsement is used for new policyholders that have previously notified claims to a prior insurer.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Excluded Individuals or Entities Endorsement	GC WF CPA 02 03 0526	ENDT	Optional	Restricts	No	This optional endorsement is used to limit coverage for individuals or entities that already have coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Fee Suit Exclusion Endorsement	GC WF CPA 02 04 0526	ENDT	Optional	Restricts	No	This optional exclusionary endorsement is used for CPA firm that have disclosed an unusual number of fee suits in the application for coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Legal Services Exclusion Endorsement	GC WF CPA 02 05 0526	ENDT	Optional	Restricts	No	This optional extension endorsement is available for CPA firms that also practice as a law firm and do not require additional coverage as there is a separate policy.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Life Insurance Agent Exclusion Endorsement	GC WF CPA 02 06 0526	ENDT	Optional	Restricts	No	This endorsement used for firms with Life Insurance Agent exposure and has separate coverage
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - Registered Representative Exclusion Endorsement	GC WF CPA 02 07 0526	ENDT	Optional	Restricts	No	This endorsement used for firms with Personal Financial Planning exposure and has separate coverage.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - SEC Public Audit Exclusion (Absolute) Endorsement	GC WF CPA 02 08 0526	ENDT	Optional	Restricts	No	This blanket exclusionary endorsement is only applicable to CPA firms that had a past exposure in public audit attest services.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - SEC Public Audit Exclusion (Limited) Endorsement	GC WF CPA 02 09 0526	ENDT	Optional	Restricts	No	This specific exclusionary endorsement is only applicable to CPA firms that had a past exposure in public audit attest services. The endorsement identifies specific high risk clients only
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - SEC Public Audit Exclusion (Modified) Endorsement	GC WF CPA 02 10 0526	ENDT	Optional	Restricts	No	This specific limitation endorsement is only applicable to CPA firms that had a past exposure in public audit attest services. The endorsement reduces the limit of liability or increases the deductible for public audit attest services
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - AMENDATORY ENDORSEMENT - BODILY INJURY EXCLUSION	GC WF CPA 02 15 0526	ENDT	Optional	Restricts	No	Amends policy to add an exclusion for bodily injury
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - AMENDATORY ENDORSEMENT - ESOP TRUSTEE EXCLUSION	GC WF CPA 02 16 0526	ENDT	Optional	Restricts	No	Amends policy to add an exclusion for an ESOP Trustee
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - AMENDATORY ENDORSEMENT - REAL ESTATE AGENT EXCLUSION	GC WF CPA 02 17 0526	ENDT	Optional	Restricts	No	Amends policy to add an exclusion for real estate agents
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - AMENDATORY ENDORSEMENT - PERSONAL PROFIT EXCLUSION	GC WF CPA 02 18 0526	ENDT	Optional	Restricts	No	Amends policy to add an exclusion for personal profit

ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY - AMENDATORY ENDORSEMENT - TRUSTEE SERVICES EXCLUSION	GC WF CPA 02 19 0526	ENDT	Optional	Restricts	No	Amends policy to add an exclusion for trustee services
APPLICATIONS						
Fraud Warning Addendum	148193 3/26	Other	Mandatory	Other	No	Attaches to the application and includes fraud warnings by state.
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE APPLICATION	GC WF CPA APP 01 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION	GC WF CPA APP 02 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION FOR SMALL FIRMS	GC WF CPA APP 03 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL WARRANTY APPLICATION	GC WF CPA APP 04 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY BRIDGE QUESTIONNAIRE & REPRESENTATION STATEMENT	GC WF CPA APP 05 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY PREMIUM ESTIMATE FORM	GC WF CPA APP 06 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Audit Supplement	GC WF CPA APP 07 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Claim Supplement	GC WF CPA APP 08 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY D&O (Management Liability) Supplement	GC WF CPA APP 09 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Employment Practices Liability Supplement	GC WF CPA APP 10 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Financial Institutions Supplement	GC WF CPA APP 11 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Increased Limits of Liability Supplement	GC WF CPA APP 12 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Lateral Hire Supplement	GC WF CPA APP 13 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Lawyers Supplement	GC WF CPA APP 14 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Mergers & Acquisitions (M&A) Supplement	GC WF CPA APP 15 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Non-Trustee Discretionary Authority Supplement	GC WF CPA APP 16 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Outside Interest Supplement	GC WF CPA APP 17 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Personal Financial Planning Services Supplement	GC WF CPA APP 18 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Regulatory and SEC Investigation Supplement	GC WF CPA APP 19 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Risk Management Supplement	GC WF CPA APP 20 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Securities Supplement	GC WF CPA APP 21 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Sub-Prime Mortgage Supplement	GC WF CPA APP 22 0526	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Taxation Supplement	GC WF CPA APP 23 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Trustee Services Supplement	GC WF CPA APP 24 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Valuation Supplement	GC WF CPA APP 25 0821	APP	N/A	N/A	NO	Application
ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Identity Theft Supplement	GC WF CPA APP 26 0821	APP	N/A	N/A	NO	Application