



NOTICE OF EFFECTIVE FILING

TO: Melissa Jacobson

FROM: Milinda Tanner & Nitza Cordero-Vargas

DATE: September 25, 2026

☒ **FORM** ☒ **RULE** ☒ **RATE**

BUSINESS UNIT: Division 66

TOI: 17.0 Other Liability-Occ/Claims Made **SUB-TOI:** 17.0019 Professional Errors and Omissions Liability

PROGRAM NAME: CPA Gold Accountants and Consultants

FILING NUMBER: AIG-26-EO-03 **STATE:** Massachusetts **EFFECTIVE DATE:** October 1, 2026

CONTENTS INCLUDE: Please refer to SharePoint for copies of the state-specified forms listing detailing proprietary forms included in this filing.

- Dec Page
- Policy
- Endorsements
- Applications
- Rating Plan

State Specific Forms:

- CPAGold Forms Manual – Massachusetts GC WF CPA F MA 01 0726

MODIFICATIONS: **Do Not Use:**

- PREMIUM ESTIMATE FORM GC WF CPA APP 06 0821

COMMENTS: None

COMPANY(IES) FILED:

☒ **AMERICAN HOME ASSURANCE COMPANY**

Disposition for AGNY-135048130

Filing at a Glance

State: Massachusetts	SERFF Tracking Number: AGNY-135048130
TOI: 17.2 Other Liability-Claims Made Only	State Tracking Number:
Sub-TOI: 17.2019 Professional Errors and Omissions Liability	Company Tracking Number: AIG-26-EO-03
Filing Type: Form/Rate/Rule	Product Name: CPA Gold Accountants & Consultants Professional Liability Program/151-640-288
Filing Company: American Home Assurance Company	Project Name: CPA Gold Accountants & Consultants Professional Liability Program (CPA)
	Destruction Date:

Disposition Date:

09/24/2026

Effective Date (New):

10/01/2026

Effective Date (Renewal):

10/01/2026

Status: *

Placed on File

Comments:

Company Rate Information

Company Name:	Overall % Indicated Change:	Overall % Rate Impact:	Written Premium Change for this Program:	Number of Policy Holders Affected for this Program:	Written Premium for this Program:	Maximum % Change (where required):	Minimum % Change (where required):
American Home Assurance Company	0.000 %	0.000 %	\$ 0	0	\$ 0	0.000 %	0.000 %

Change Period for Approved Rate:

Schedule Items

Item Type	Item Name	Item Status	Public Access
Form	GC WF CPA 00 01, 0426, Policy/Coverage Form, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE POLICY	Placed on File	Yes
Form	GC WF CPA DEC 01, 0426, Declarations/Schedule, Accountants & Consultants Professional Liability Insurance Policy Declarations	Placed on File	Yes
Form	GC WF CPA FS 01, 0426, Other, Schedule of Policy Forms and Endorsements	Placed on File	Yes
Form	GC WF CPA 01 01, 0821, Endorsement/Amendment/Conditions, Additional Insured Endorsement	Placed on File	Yes
Form	GC WF CPA 01 02, 0526, Endorsement/Amendment/Conditions, Affiliation as Additional Insured Endorsement	Placed on File	Yes
Form	GC WF CPA 01 03, 0821, Endorsement/Amendment/Conditions, Affiliation or Association Endorsement	Placed on File	Yes
Form	GC WF CPA 01 04, 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement	Placed on File	Yes
Form	GC WF CPA 01 05, 0526, Endorsement/Amendment/Conditions, Anti-Stacking of Limits Endorsement	Placed on File	Yes
Form	GC WF CPA 01 06, 0526, Endorsement/Amendment/Conditions, Broadcasters Liability Endorsement	Placed on File	Yes
Form	GC WF CPA 01 07, 0821, Endorsement/Amendment/Conditions, Cancellation Endorsement	Placed on File	Yes
Form	GC WF CPA 01 08, 0526, Endorsement/Amendment/Conditions, Defense Expenses Outside of the Limits of Liability Endorsement	Placed on File	Yes
Form	GC WF CPA 01 10, 0526, Endorsement/Amendment/Conditions, Discrimination Complaint Endorsement	Placed on File	Yes
Form	GC WF CPA 01 11, 0821, Endorsement/Amendment/Conditions, Extended Reporting Period (Death or Disability) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 12, 0821, Endorsement/Amendment/Conditions, Extended Reporting Period (Individual Retirement) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 13, 0821, Endorsement/Amendment/Conditions, Extended Reporting Period (Reinstated Limits) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 14, 0526, Endorsement/Amendment/Conditions, Extended Reporting Period (Revised ERP) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 15, 0526, Endorsement/Amendment/Conditions, Extended Reporting Period (Standard) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 16, 0526, Endorsement/Amendment/Conditions, Fiduciary Endorsement	Placed on File	Yes
Form	GC WF CPA 01 17, 0526, Endorsement/Amendment/Conditions, General Change Endorsement	Placed on File	Yes

Form	GC WF CPA 01 18, 0526, Endorsement/Amendment/Conditions, General Counsel Endorsement	Placed on File	Yes
Form	GC WF CPA 01 20, 0526, Endorsement/Amendment/Conditions, Identity Theft Sublimit Endorsement	Placed on File	Yes
Form	GC WF CPA 01 23, 0821, Endorsement/Amendment/Conditions, Lateral Hire Coverage Endorsement	Placed on File	Yes
Form	GC WF CPA 01 24, 0526, Endorsement/Amendment/Conditions, Life Insurance Agent (Excess) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 25, 0526, Endorsement/Amendment/Conditions, Life Insurance Agent Endorsement	Placed on File	Yes
Form	GC WF CPA 01 26, 0526, Endorsement/Amendment/Conditions, Maintenance Deductible Endorsement	Placed on File	Yes
Form	GC WF CPA 01 27, 0526, Endorsement/Amendment/Conditions, Managed Aggregate Limit (Multi-Year) Endorsement	Placed on File	Yes
Form	GC WF CPA 01 28, 0526, Endorsement/Amendment/Conditions, Management Liability Endorsement	Placed on File	Yes
Form	GC WF CPA 01 29, 0526, Endorsement/Amendment/Conditions, Modified Deductible Endorsement	Placed on File	Yes
Form	GC WF CPA 01 30, 0526, Endorsement/Amendment/Conditions, Outside Organization Directors & Officers Endorsement	Placed on File	Yes
Form	GC WF CPA 01 31, 0526, Endorsement/Amendment/Conditions, Part-Time Legal Services Endorsement	Placed on File	Yes
Form	GC WF CPA 01 32, 0526, Endorsement/Amendment/Conditions, Part-Time Practice Endorsement	Placed on File	Yes
Form	GC WF CPA 01 33, 0526, Endorsement/Amendment/Conditions, Public Companies Accounting Oversight Board (PCAOB) Investigation Endorsement	Placed on File	Yes
Form	GC WF CPA 01 34, 0821, Endorsement/Amendment/Conditions, Prior Acts Limitation Endorsement	Placed on File	Yes
Form	GC WF CPA 01 35, 0526, Endorsement/Amendment/Conditions, Prior and Pending Litigation Endorsement	Placed on File	Yes
Form	GC WF CPA 01 36, 0426, Endorsement/Amendment/Conditions, Privacy and Network Security Acts Endorsement	Placed on File	Yes
Form	GC WF CPA 01 37, 0526, Endorsement/Amendment/Conditions, Real Estate Agent Endorsement	Placed on File	Yes
Form	GC WF CPA 01 39, 0526, Endorsement/Amendment/Conditions, Registered Representative Endorsement	Placed on File	Yes
Form	GC WF CPA 01 40, 0821, Endorsement/Amendment/Conditions, Reinstatement Endorsement	Placed on File	Yes

Form	GC WF CPA 01 41, 0526, Endorsement/Amendment/Conditions, Registered Investment Advisor Endorsement	Placed on File	Yes
Form	GC WF CPA 01 42, 0526, Endorsement/Amendment/Conditions, Sarbanes-Oxley Endorsement	Placed on File	Yes
Form	GC WF CPA 01 43, 0526, Endorsement/Amendment/Conditions, Selection of Counsel Endorsement	Placed on File	Yes
Form	GC WF CPA 01 44, 0426, Endorsement/Amendment/Conditions, Self-Insured Retention Endorsement	Placed on File	Yes
Form	GC WF CPA 01 45, 0526, Endorsement/Amendment/Conditions, Single Engagement Excess Limit of Liability Endorsement	Placed on File	Yes
Form	GC WF CPA 01 46, 0526, Endorsement/Amendment/Conditions, Social Engineering and Fraudulent Instruction Endorsement	Placed on File	Yes
Form	GC WF CPA 01 47, 0526, Endorsement/Amendment/Conditions, Split Retroactive Date Endorsement	Placed on File	Yes
Form	GC WF CPA 01 48, 0526, Endorsement/Amendment/Conditions, Subpoena Cap Endorsement	Placed on File	Yes
Form	GC WF CPA 01 49, 0526, Endorsement/Amendment/Conditions, Tax Preparers and Public Accountants Endorsement	Placed on File	Yes
Form	GC WF CPA 01 50, 0526, Endorsement/Amendment/Conditions, Trust Liability Endorsement	Placed on File	Yes
Form	GC WF CPA 02 01, 0426, Endorsement/Amendment/Conditions, Cyber Exclusion Endorsement	Placed on File	Yes
Form	GC WF CPA 02 02, 0526, Endorsement/Amendment/Conditions, Excluded Claims Endorsement	Placed on File	Yes
Form	GC WF CPA 02 03, 0526, Endorsement/Amendment/Conditions, Excluded Individuals or Entities Endorsement	Placed on File	Yes
Form	GC WF CPA 02 04, 0526, Endorsement/Amendment/Conditions, Fee Suit Exclusion Endorsement	Placed on File	Yes
Form	GC WF CPA 02 05, 0526, Endorsement/Amendment/Conditions, Legal Services Exclusion Endorsement	Placed on File	Yes
Form	GC WF CPA 02 06, 0526, Endorsement/Amendment/Conditions, Life Insurance Agent Exclusion Endorsement	Placed on File	Yes
Form	GC WF CPA 02 07, 0526, Endorsement/Amendment/Conditions, Registered Representative Exclusion Endorsement	Placed on File	Yes
Form	GC WF CPA 02 08, 0526, Endorsement/Amendment/Conditions, SEC Public Audit Exclusion (Absolute) Endorsement	Placed on File	Yes
Form	GC WF CPA 02 09, 0526, Endorsement/Amendment/Conditions, SEC Public Audit Exclusion (Limited) Endorsement	Placed on File	Yes
Form	GC WF CPA 02 10, 0526, Endorsement/Amendment/Conditions, SEC Public Audit Exclusion (Modified) Endorsement	Placed on File	Yes

Form	GC WF CPA 02 15, 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement – Bodily Injury Exclusion	Placed on File	Yes
Form	GC WF CPA 02 16, 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement – ESOP Trustee Exclusion	Placed on File	Yes
Form	GC WF CPA 02 17, 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement – Real Estate Exclusion	Placed on File	Yes
Form	GC WF CPA 02 18, 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement – Personal Profit Exclusion	Placed on File	Yes
Form	GC WF CPA 02 19 , 0526, Endorsement/Amendment/Conditions, Amendatory Endorsement – Trustee Services Exclusion	Placed on File	Yes
Form	148193, (03/26), Other, FRAUD WARNINGS APPLICATION ADDENDUM	Placed on File	Yes
Form	GC WF CPA APP 01, 0526, Application/Binder/Enrollment, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE APPLICATION	Placed on File	Yes
Form	GC WF CPA APP 02, 0526, Application/Binder/Enrollment, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION	Placed on File	Yes
Form	GC WF CPA APP 03, 0526, Application/Binder/Enrollment, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION FOR SMALL FIRMS	Placed on File	Yes
Form	GC WF CPA APP 04, 0526, Application/Binder/Enrollment, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL WARRANTY APPLICATION	Placed on File	Yes
Form	GC WF CPA APP 05, 0526, Application/Binder/Enrollment, ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY BRIDGE QUESTIONNAIRE & REPRESENTATION STATEMENT	Placed on File	Yes
Form	GC WF CPA APP 06, 0821, Application/Binder/Enrollment, PREMIUM ESTIMATE FORM	Withdrawn	Yes
<i>Form</i>	<i>GC WF CPA APP 06, 0821, Application/Binder/Enrollment, PREMIUM ESTIMATE FORM</i>	<i>Withdrawn</i>	<i>Yes</i>
Rate	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Rating Guidelines CPAGold (Global), GC WF CPA RR 01 0526	Placed on File	Yes
Rate	CPAGold Forms Manual - Massachusetts, GC WF CPA F MA 01 0726	Placed on File	Yes
Supporting Document	Certification of Compliance	Placed on File	Yes
Supporting Document	Policy Endorsement List	Placed on File	Yes
Supporting Document	Annotated Comparison	Placed on File	Yes

Supporting Document	Form Utilization List	Placed on File	Yes
Supporting Document	Base Checklist(s) - Property and Casualty Insurance	Placed on File	Yes
Supporting Document	Actuarial Memorandum and Abstract Form - Property and Casualty Insurance	Placed on File	Yes
Supporting Document	Statement of Variability	Placed on File	Yes
<i>Supporting Document</i>	<i>Statement of Variability</i>	<i>Withdrawn</i>	<i>Yes</i>
<i>Supporting Document</i>	<i>Statement of Variability</i>	<i>Withdrawn</i>	<i>Yes</i>
Supporting Document	Letter of Authorization	Placed on File	Yes

Jim McLean
Policy Form Review
MA Division of Insurance



Filings	Messages	Billing	Settings	Filing Rules	Reports	Templates	Alerts (3)
My Workfolder	My Open Filings	My Draft Filings	Search Filings	Create Filing	Create Paper Filing		

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Massachusetts

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This Filing has been marked as public access.

This filing has post submission updates.

Product Name: CPA Gold Accountants & Consultants Professional Liability Program/151-640-288
TOI: 17.2 Other Liability-Claims Made Only
Sub-TOI: 17.2019 Professional Errors and Omissions Liability
Filing Type: Form/Rate/Rule
Effective Date Requested (New): 10/01/2026
Effective Date Requested (Renewal): 10/01/2026

SERFF Tr Num: AGNY-135048130
State Tr Num:
Co Tr Num: AIG-26-EO-03
Date Submitted: 08/12/2026
Authors: Veronica Bullock, Milinda Tanner, Nitza Cordero

SERFF Status: Closed-Placed on File
State Status: Closed-Placed On File
Co Status:
Disposition Date: 09/24/2026

General Information		Form Schedule	Rate/Rule Schedule	Supporting Documentation	Companies and Contact	Filing Fees	Filing Correspondence			
Form Count: 70										
Item No.		Schedule Item Status	Form Name *	Form Number	Edition Date	Form Type *	Action *	Action Specific Data	Readability Score	Attachments
1		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE POLICY	GC WF CPA 00 01	0426	PCF	New			 GC WF CPA 00 01 0426 - Accountants & Consultants PL Policy .pdf
2		Placed on File 09/24/2026	Accountants & Consultants Professional Liability Insurance Policy Declarations	GC WF CPA DEC 01	0426	DEC	New			 GC WF CPA DEC 01 0426 Accountants Consultants PL Dec MA
3		Placed on File 09/24/2026	Schedule of Policy Forms and Endorsements	GC WF CPA FS 01	0426	OTH	New			 GC WF CPA FS 01 0426 - Accountants & Consultants PL Schedule.p
4		Placed on File 09/24/2026	Additional Insured Endorsement	GC WF CPA 01 01	0821	END	New			 GC WF CPA 01 01 0821 - Additional Insured Endorsement.pdf
5		Placed on File 09/24/2026	Affiliation as Additional Insured Endorsement	GC WF CPA 01 02	0526	END	New			 GC WF CPA 01 02 0526 - Affiliation as Additional Insured Endorsement.pdf
6		Placed on File 09/24/2026	Affiliation or Association Endorsement	GC WF CPA 01 03	0821	END	New			 GC WF CPA 01 03 0821 - Affiliation or Association Endorsement.pdf
7		Placed on File 09/24/2026	Amendatory Endorsement	GC WF CPA 01 04	0526	END	New			 GC WF CPA 01 04 0526 - Amendatory Endorsement.pdf
8		Placed on File 09/24/2026	Anti-Stacking of Limits Endorsement	GC WF CPA 01 05	0526	END	New			 GC WF CPA 01 05 0526 - Anti-Stacking Endorsement.pdf
9		Placed on File 09/24/2026	Broadcasters Liability Endorsement	GC WF CPA 01 06	0526	END	New			 GC WF CPA 01 06 0526 - Broadcasters Endorsement.pdf
10		Placed on File 09/24/2026	Cancellation Endorsement	GC WF CPA 01 07	0821	END	New			 GC WF CPA 01 07 0821 - Cancellation Endorsement.pdf

11		Placed on File 09/24/2026	Defense Expenses Outside of the Limits of Liability Endorsement	GC WF CPA 01 08	0526	END	New	 GC WF CPA 01 08 0526 - DEOL Endorsement.pdf
12		Placed on File 09/24/2026	Discrimination Complaint Endorsement	GC WF CPA 01 10	0526	END	New	 GC WF CPA 01 10 0526 - Discrimination Complaint Endorsement.pdf
13		Placed on File 09/24/2026	Extended Reporting Period (Death or Disability) Endorsement	GC WF CPA 01 11	0821	END	New	 GC WF CPA 01 11 0821 - Extended Reporting Period (Death or Disa
14		Placed on File 09/24/2026	Extended Reporting Period (Individual Retirement) Endorsement	GC WF CPA 01 12	0821	END	New	 GC WF CPA 01 12 0821 - Extended Reporting Period (Individual Ret
15		Placed on File 09/24/2026	Extended Reporting Period (Reinstated Limits) Endorsement	GC WF CPA 01 13	0821	END	New	 GC WF CPA 01 13 0821 - Extended Reporting Period (Reinstated Lir
16		Placed on File 09/24/2026	Extended Reporting Period (Revised ERP) Endorsement	GC WF CPA 01 14	0526	END	New	 GC WF CPA 01 14 0526 - Extended Reporting Period (Revised ERP)
17		Placed on File 09/24/2026	Extended Reporting Period (Standard) Endorsement	GC WF CPA 01 15	0526	END	New	 GC WF CPA 01 15 0526 - Extended Reporting Period (Standard) Enc
18		Placed on File 09/24/2026	Fiduciary Endorsement	GC WF CPA 01 16	0526	END	New	 GC WF CPA 01 16 0526 - Fiduciary Endorsement.pdf
19		Placed on File 09/24/2026	General Change Endorsement	GC WF CPA 01 17	0526	END	New	 GC WF CPA 01 17 0526 - General Change Endorsement.pdf
20		Placed on File 09/24/2026	General Counsel Endorsement	GC WF CPA 01 18	0526	END	New	 GC WF CPA 01 18 0526 - General Counsel Endorsement.pdf
21		Placed on File 09/24/2026	Identity Theft Sublimit Endorsement	GC WF CPA 01 20	0526	END	New	 GC WF CPA 01 20 0526 - Identity Theft Sublimit Endorsement.pdf
22		Placed on File 09/24/2026	Lateral Hire Coverage Endorsement	GC WF CPA 01 23	0821	END	New	 GC WF CPA 01 23 0821 - Lateral Hire Endorsement.pdf
23		Placed on File 09/24/2026	Life Insurance Agent (Excess) Endorsement	GC WF CPA 01 24	0526	END	New	 GC WF CPA 01 24 0526 - Life Insurance Agent (Excess) Endorseme
24		Placed on File 09/24/2026	Life Insurance Agent Endorsement	GC WF CPA 01 25	0526	END	New	 GC WF CPA 01 25 0526 - Life Insurance Agent Endorsement.pdf
25		Placed on File 09/24/2026	Maintenance Deductible Endorsement	GC WF CPA 01 26	0526	END	New	 GC WF CPA 01 26 0526 - Maintenance Deductible Endorsement.pdf
26		Placed on File 09/24/2026	Managed Aggregate Limit (Multi-Year) Endorsement	GC WF CPA 01 27	0526	END	New	 GC WF CPA 01 27 0526 - Managed Aggregate Limit (Multi-Year) Enc
27		Placed on File 09/24/2026	Management Liability Endorsement	GC WF CPA 01 28	0526	END	New	 GC WF CPA 01 28 0526 - Management Liability Endorsement.pdf
28		Placed on File 09/24/2026	Modified Deductible	GC WF CPA 01	0526	END	New	 GC WF CPA 01 29 0526 - Modified Deductible Endorsement.pdf

		Endorsement	29					
29		Placed on File 09/24/2026	Outside Organization Directors & Officers Endorsement	GC WF CPA 01 30	0526	END	New	 GC WF CPA 01 30 0526 - Outside DO Endorsement.pdf
30		Placed on File 09/24/2026	Part-Time Legal Services Endorsement	GC WF CPA 01 31	0526	END	New	 GC WF CPA 01 31 0526 - Part-Time Legal Services Endorsement.pdf
31		Placed on File 09/24/2026	Part-Time Practice Endorsement	GC WF CPA 01 32	0526	END	New	 GC WF CPA 01 32 0526 - Part-Time Practice Endorsement.pdf
32		Placed on File 09/24/2026	Public Companies Accounting Oversight Board (PCAOB) Investigation Endorsement	GC WF CPA 01 33	0526	END	New	 GC WF CPA 01 33 0526 - PCAOB Investigation Endorsement.pdf
33		Placed on File 09/24/2026	Prior Acts Limitation Endorsement	GC WF CPA 01 34	0821	END	New	 GC WF CPA 01 34 0821 - Prior Acts Limitation Endorsement.pdf
34		Placed on File 09/24/2026	Prior and Pending Litigation Endorsement	GC WF CPA 01 35	0526	END	New	 GC WF CPA 01 35 0526 - Prior and Pending Litigation Endorsement.pdf
35		Placed on File 09/24/2026	Privacy and Network Security Acts Endorsement	GC WF CPA 01 36	0426	END	New	 GC WF CPA 01 36 0426 - Privacy and Network Security Acts Endorsement.pdf
36		Placed on File 09/24/2026	Real Estate Agent Endorsement	GC WF CPA 01 37	0526	END	New	 GC WF CPA 01 37 0526 - Real Estate Agent Endorsement.pdf
37		Placed on File 09/24/2026	Registered Representative Endorsement	GC WF CPA 01 39	0526	END	New	 GC WF CPA 01 39 0526 - Registered Representative Endorsement.pdf
38		Placed on File 09/24/2026	Reinstatement Endorsement	GC WF CPA 01 40	0821	END	New	 GC WF CPA 01 40 0821 - Reinstatement Endorsement.pdf
39		Placed on File 09/24/2026	Registered Investment Advisor Endorsement	GC WF CPA 01 41	0526	END	New	 GC WF CPA 01 41 0526 - RIA Endorsement.pdf
40		Placed on File 09/24/2026	Sarbanes-Oxley Endorsement	GC WF CPA 01 42	0526	END	New	 GC WF CPA 01 42 0526 - Sarbanes-Oxley Endorsement.pdf
41		Placed on File 09/24/2026	Selection of Counsel Endorsement	GC WF CPA 01 43	0526	END	New	 GC WF CPA 01 43 0526 - Selection of Counsel Endorsement.pdf
42		Placed on File 09/24/2026	Self-Insured Retention Endorsement	GC WF CPA 01 44	0426	END	New	 GC WF CPA 01 44 0426 - Self-Insured Retention Endorsement.pdf
43		Placed on File 09/24/2026	Single Engagement Excess Limit of Liability Endorsement	GC WF CPA 01 45	0526	END	New	 GC WF CPA 01 45 0526 - Single Engagement Excess Limit Endorsement.pdf
44		Placed on File 09/24/2026	Social Engineering and Fraudulent Instruction Endorsement	GC WF CPA 01 46	0526	END	New	 GC WF CPA 01 46 0526 - Social Engineering and Fraudulent Instruction Endorsement.pdf
45		Placed on File 09/24/2026	Split Retroactive Date Endorsement	GC WF CPA 01 47	0526	END	New	 GC WF CPA 01 47 0526 - Split Retro Endorsement.pdf

46		Placed on File 09/24/2026	Subpoena Cap Endorsement	GC WF CPA 01 48	0526	END	New	 GC WF CPA 01 48 0526 - Subpoena Cap Endorsement.pdf
47		Placed on File 09/24/2026	Tax Preparers and Public Accountants Endorsement	GC WF CPA 01 49	0526	END	New	 GC WF CPA 01 49 0526 - Tax Preparers and Public Accountants Endorsement.pdf
48		Placed on File 09/24/2026	Trust Liability Endorsement	GC WF CPA 01 50	0526	END	New	 GC WF CPA 01 50 0526 - Trust Liability Endorsement.pdf
49		Placed on File 09/24/2026	Cyber Exclusion Endorsement	GC WF CPA 02 01	0426	END	New	 GC WF CPA 02 01 0426 - Cyber Exclusion Endorsement.pdf
50		Placed on File 09/24/2026	Excluded Claims Endorsement	GC WF CPA 02 02	0526	END	New	 GC WF CPA 02 02 0526 - Excluded Claims Endorsement.pdf
51		Placed on File 09/24/2026	Excluded Individuals or Entities Endorsement	GC WF CPA 02 03	0526	END	New	 GC WF CPA 02 03 0526 - Excluded Individuals or Entities Endorsement.pdf
52		Placed on File 09/24/2026	Fee Suit Exclusion Endorsement	GC WF CPA 02 04	0526	END	New	 GC WF CPA 02 04 0526 - Fee Suit Exclusion Endorsement.pdf
53		Placed on File 09/24/2026	Legal Services Exclusion Endorsement	GC WF CPA 02 05	0526	END	New	 GC WF CPA 02 05 0526 - Legal Services Exclusion Endorsement.pdf
54		Placed on File 09/24/2026	Life Insurance Agent Exclusion Endorsement	GC WF CPA 02 06	0526	END	New	 GC WF CPA 02 06 0526 - Life Insurance Agent Exclusion Endorsement.pdf
55		Placed on File 09/24/2026	Registered Representative Exclusion Endorsement	GC WF CPA 02 07	0526	END	New	 GC WF CPA 02 07 0526 - Registered Representative Exclusion.pdf
56		Placed on File 09/24/2026	SEC Public Audit Exclusion (Absolute) Endorsement	GC WF CPA 02 08	0526	END	New	 GC WF CPA 02 08 0526 - SEC Public Audit Exclusion (Absolute) Endorsement.pdf
57		Placed on File 09/24/2026	SEC Public Audit Exclusion (Limited) Endorsement	GC WF CPA 02 09	0526	END	New	 GC WF CPA 02 09 0526 - SEC Public Audit Exclusion (Limited) Endorsement.pdf
58		Placed on File 09/24/2026	SEC Public Audit Exclusion (Modified) Endorsement	GC WF CPA 02 10	0526	END	New	 GC WF CPA 02 10 0526 - SEC Public Audit Exclusion (Modified) Endorsement.pdf
59		Placed on File 09/24/2026	Amendatory Endorsement – Bodily Injury Exclusion	GC WF CPA 02 15	0526	END	New	 GC WF CPA 02 15 0526 - Amendatory Endorsement - Bodily Injury Exclusion.pdf
60		Placed on File 09/24/2026	Amendatory Endorsement – ESOP Trustee Exclusion	GC WF CPA 02 16	0526	END	New	 GC WF CPA 02 16 0526 - Amendatory Endorsement - ESOP Trustee Exclusion.pdf
61		Placed on File 09/24/2026	Amendatory Endorsement – Real Estate Exclusion	GC WF CPA 02 17	0526	END	New	 GC WF CPA 02 17 0526 - Amendatory Endorsement - Real Estate Exclusion.pdf
62		Placed on File 09/24/2026	Amendatory Endorsement – Personal Profit Exclusion	GC WF CPA 02 18	0526	END	New	 GC WF CPA 02 18 0526 - Amendatory Endorsement - Personal Profit Exclusion.pdf

63		Placed on File 09/24/2026	Amendatory Endorsement – Trustee Services Exclusion	GC WF CPA 02 19	0526	END	New		GC WF CPA 02 19 0526 - Amendatory Endorsement - Trustee Servi
64		Placed on File 09/24/2026	FRAUD WARNINGS APPLICATION ADDENDUM	148193	(03/26)	OTH	New		148193 (03-26) FRAUD WARNINGS - APPLICATION ADDENDUM.pdf
65		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE APPLICATION	GC WF CPA APP 01	0526	ABE	New		GC WF CPA APP 01 0526 Full Application w co name.pdf
66		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION	GC WF CPA APP 02	0526	ABE	New		GC WF CPA APP 02 0526 CW Renewal Application w co name.
67		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL APPLICATION FOR SMALL FIRMS	GC WF CPA APP 03	0526	ABE	New		GC WF CPA APP 03 0526 Renewal Application for Small Firms
68		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY INSURANCE RENEWAL WARRANTY APPLICATION	GC WF CPA APP 04	0526	ABE	New		GC WF CPA APP 04 0526 Renewal Warranty Application w co
69		Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY BRIDGE QUESTIONNAIRE & REPRESENTATION STATEMENT	GC WF CPA APP 05	0526	ABE	New		GC WF CPA APP 05 0526 Bridge Questionnaire and Representa
70		Withdrawn 09/24/2026	PREMIUM ESTIMATE FORM	GC WF CPA APP 06	0821	ABE	Withdrawn	Previous Filing # Replaced Form #	
Previous Version									
		Withdrawn 09/24/2026	PREMIUM ESTIMATE FORM	GC WF CPA APP 06	0821	ABE	New		GC WF CPA APP 06 0821 Premium Estimate Form w co nam

Form Type Legend:

- **ADV** = Advertising
 - **BND** = Bond
 - **CER** = Certificate
 - **DSC** = Disclosure/Notice
 - **END** = Endorsement/Amendment/Conditions
 - **PCF** = Policy/Coverage Form
- **ABE** = Application/Binder/Enrollment
 - **CNR** = Canc/NonRen Notice
 - **DEC** = Declarations/Schedule
 - **ERS** = Election/Rejection/Supplemental Applications
 - **OTH** = Other

Icon Legend:  - Draft Schedule Item  - Open Objection

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Tracking Number:

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This Filing has been marked as public access.

This filing has post submission updates.

Product Name: CPA Gold Accountants & Consultants Professional Liability Program/151-640-288

TOI: 17.2 Other Liability-Claims Made Only

Sub-TOI: 17.2019 Professional Errors and Omissions Liability

Filing Type: Form/Rate/Rule

Effective Date Requested (New): 10/01/2026

Effective Date Requested (Renewal): 10/01/2026

SERFF Tr Num: AGNY-135048130

State Tr Num:

Co Tr Num: AIG-26-EO-03

Date Submitted: 08/12/2026

Authors: Veronica Bullock, Milinda Tanner, Nitza Cordero

SERFF Status: Closed-Placed on File

State Status: Closed-Placed On File

Co Status:

Disposition Date: 09/24/2026

General Information	Form Schedule	Rate/Rule Schedule	Supporting Documentation	Companies and Contact	Filing Fees	Filing Correspondence
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The rate schedule has been marked public access.

Add Rate Data? Rate Data is Required

Filing Method:

File & Use

Rate Change Type:

Neutral

Overall Percentage of Last Rate Revision:

0.000 %

Effective Date of Last Rate Revision:

Filing Method of Last Filing:

N/A - New Program

SERFF Tracking Number of Last Filing:

Company Rate Information							
Company Name:	Overall % Indicated Change:	Overall % Rate Impact:	Written Premium Change for this Program:	Number of Policy Holders Affected for this Program:	Written Premium for this Program:	Maximum % Change (where required):	Minimum (where re
American Home Assurance Company	0.000 %	0.000 %	\$0.00	0	\$0.00	0.000 %	0.000 %

Item No.	Schedule Item Status	Exhibit Name: *	Rule# or Page #:	Rate Action: *	Previous State Filing Number:	Attach Document:
1	Placed on File 09/24/2026	ACCOUNTANTS & CONSULTANTS PROFESSIONAL LIABILITY Rating Guidelines CPAGold (Global)	GC WF CPA RR 01 0526	New		GC WF CPA RR 01 0526 CPAGold Rating Manual CW.pdf
2	Placed on File 09/24/2026	CPAGold Forms Manual - Massachusetts	GC WF CPA F MA 01 0726	New		GC WF CPA F MA 01 0726 CPAGold Forms Manual Massachusetts.r

Icon Legend: - Draft Schedule Item - Open Objection

Add Authors

Update

Compare Attachments

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