

CPA Value Plan

Part of the  Professional Liability Insurance Program

▶ **Who can apply for CPA Value Plan?**

Any CPA firm with three or fewer professionals and annual revenue up to \$400,000. Other eligibility requirements apply.

▶ **What are the unique product features and benefits?**

- New policy features and coverage enhancements now available!
 - New Network Risk and Privacy Claim endorsement
 - New Coverage for Court-Appointed Receivers/Trustees
 - Increased Regulatory Inquiry Coverage – now up to \$12,500
 - Increased Defendants Reimbursement – now \$75 per hour
- Rates are low because they are based on the loss experience of small firms.
- Free, real-time, no-obligation online quotes are available with the option to purchase online by using a credit card.
- CPA Value Plan provides broad coverage for general accounting and consulting services, including tax planning and preparation, personal financial planning, bookkeeping, compilations, reviews, audits, management advisory services, EDP and system consultations, general business planning, and litigation support services.
- Available per claim and aggregate liability limits include \$100,000/\$250,000; \$250,000/\$500,000; \$500,000/\$1,000,000; and \$1,000,000/\$2,000,000.
- CPA Value Plan has a simple renewal process, available online or offline.

▶ **Is this coverage automatic or is underwriting required?**

Coverage is underwritten. Firms qualify themselves by answering 14 true/false questions. If a firm does not qualify for this plan, it may qualify for the Premier Plan.

▶ **What are the premium rates for this product?**

- Premium credits can make coverage more affordable for your firm. Premium credits can be awarded for:
 - Membership in AICPA Governmental or Employee Benefit Plan Audit Quality Centers
 - Risk management training participation
 - Engagement letter use
 - Receipt of an unqualified peer review
 - Claim-free status

Each firm receives a customized quotation, and rates are based upon specific risk factors. A variety of limits and deductibles allow firms to choose the level of coverage that meet the firm's structure and needs. CNA is an admitted carrier on file with each state's respective department of insurance.

(Over, please)

► **Is this product available in all states?**

Yes, CPA Value Plan is available in all states, plus the District of Columbia, Puerto Rico, and the Virgin Islands.

► **How and when can I apply for this insurance?**

Applications can be submitted at any time throughout the year – online or offline. If a firm carries professional liability insurance, the terms of the quotation will match the current effective date subject to underwriting approval. Prior acts coverage is available to qualified firms.

Apply online at www.cpai.com/ficpa.

CPA firms can work directly with Aon Insurance Services, the National Program Administrator, or a Regional Plan Representative in their area.

Find a Regional Plan Representative in your area at www.cpai.com/valuecs.

Contact Information:

Aon Insurance Services

Customer Service Representatives:

(800) 221-3023

Contact Address:

AICPA Professional Liability Insurance Program
Aon Insurance Services
159 East County Line Road
Hatboro, PA 19040-1218
www.cpai.com

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