

EVERYONE KNOWS AN ACCOUNTANT'S  
LIFE IS A LITTLE WILD AND CRAZY.



## HOW ELSE CAN YOU EXPLAIN NOT HAVING PROFESSIONAL LIABILITY COVERAGE?

Find the time to insure your firm with the CPA Value Plan.

Then you can go back to your wild and crazy life.

The CPA Value Plan is endorsed by the AICPA and monitored by an AICPA oversight committee. They help you find the plan that meets your needs with the right coverage and pricing.

Endorsed by:



Underwritten by:



Brought to you by:



# Getting sued is no party.

Unfortunately, malpractice claims happen every day. To CPA firms just like yours. And the result may be a staggering loss of time and hard-earned money. Maybe you think **your** clients are unlikely to sue. But the unfortunate truth is the world is more litigious than ever, and the possibility of a lawsuit is very real. Even when you've done nothing wrong, the cost of defending your firm or settling a claim can be financially devastating. That's why finding the time to secure professional liability insurance is a must. No matter **how** crazy your schedule may be.

A claim can be filed against any size firm — even small firms like yours.  
Cover yourself now.

## CPA Value Plan:

The coverage you need to help safeguard your firm.

The CPA Value Plan gives you the broad coverage you need to insure your firm and your staff in the event of malpractice claims. Endorsed by the AICPA, the plan covers general accounting and consulting services, including:

- Tax planning and preparation
- Personal financial planning
- Bookkeeping
- Compilations
- Reviews
- Audits
- Management advisory services
- EDP services and system consultations
- General business planning
- Litigation support services

### The CPA Value Plan offers you peace of mind, plus all of the following:

- Coverage of your professional, administrative and clerical staff, including per diem employees
- Four levels of coverage limits, from \$100,000 to \$2,000,000 for qualified insureds
- Choice of deductibles starting at \$0 for qualified insureds
- New premium credit to Private Companies Practice Section (PCPS) members
- Network risk and privacy claim endorsement
- Defendants reimbursement benefit—\$75 per hour for the time you spend to attend a trial or arbitration proceeding at CNA's request in connection with a claim
- Regulatory inquiry coverage—up to \$12,500 for attorney fees and court costs associated with responding to a regulatory investigation of your firm arising out of the rendering of professional services
- Coverage of prior acts for qualified firms
- Settlement with your written consent only
- Innocent Partners coverage for those who were not aware of fraudulent acts
- Personal trust services coverage
- Court-appointed receivers and bankruptcy trustees coverage

### Special benefit! Assistance in reducing your exposure to claims.

As part of the CPA Value Plan, your firm will be enrolled in the AICPA Professional Liability Risk Control Program to help you minimize your risk of a claim. You will find a wealth of information on risk control at the Online Policyholder Resource Center and the Online Risk Control Resource Area at [www.cpai.com](http://www.cpai.com).

Additionally, a special hotline lets you talk to risk control professionals. And through seminar, webcast and online self-study training opportunities, you can earn CPE credit and up to 7.5% off your premium each year for three consecutive years. You will also have access to handbooks and templates on preparing and using engagement letters and retaining records.

## Get affordable professional liability insurance from the plan created just for small firms.

The CPA Value Plan is an exceptional insurance plan you won't find anywhere else. In fact, it's designed exclusively for:

- Small CPA firms
- With up to \$400,000 in annual revenue
- And three or fewer professionals on staff

Large firms do not qualify for the CPA Value Plan. As part of the AICPA Professional Liability Insurance Program, you get the high-quality coverage you need at a price that fits your budget.

### A rapid application process for even the craziest schedule.

For a real-time, no-obligation quote, simply go to [www.cpai.com/valueplan](http://www.cpai.com/valueplan). And if you like what you see, you can purchase right then and there by using a credit card, online, within a matter of minutes. You can even take advantage of financing opportunities to make your payments even more manageable.

### 3 Easy Ways to Get Coverage:

1. Visit: [www.cpai.com/valueplan](http://www.cpai.com/valueplan)
2. Complete and return the enclosed application.
3. Call 1-800-221-3023 and talk to a plan representative.

Visit us online at [www.cpai.com/valueplan](http://www.cpai.com/valueplan) for:

- A quick and easy application process
- A no-obligation rate and coverage quotation
- The ability to purchase online
- All this within a matter of minutes!

[www.cpai.com/valueplan](http://www.cpai.com/valueplan)



## AICPA Professional Liability Insurance Program

Endorsed by:



The American Institute of Certified Public Accountants is the national, professional organization for all Certified Public Accountants. Its mission is to provide members with the resources, information, and leadership that enable them to provide valuable services in the highest professional manner to benefit the public as well as employers and clients.

Underwritten by:



The CPA Value Plan is underwritten by a CNA member company. CNA is the largest underwriter of professional liability insurance for accountants, serving the accounting profession since 1962.

Brought to you by:



The CPA Value Plan is brought to you by Aon Insurance Services, the AICPA Professional Liability Insurance Program Administrator since 1974. Aon Insurance Services has earned a reputation for developing innovative programs and providing consistently superior customer service.

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