

Tax Preparers

Miscellaneous Professional Liability Coverage for Tax Preparers

- ◆ Competitive Minimum Premiums
- ◆ Package with General Liability and Property
- ◆ Comprehensive Coverage Options available
- ◆ Quoting available within your authority
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Claims Examples

An insured's client was penalized by the IRS and interest was assessed when the insured incorrectly used the cash method of accounting when the accrual method should have been used.

The bookkeeper is in charge of maintaining a client's financial records, including accounts receivable and account payable. The bookkeeper did not maintain accurate records and the client failed to bill for services rendered. Since the revenue was not coming in, the client was unable to pay their bills on time and lost contracts with vendors, which, in turn, resulted in a financial loss.

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A.M. Best A+XV Rated Carrier

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