

REALTORS® Errors & Omissions Claim Report



Notice of each and every incident, claim, or suit is to be sent immediately to XL Catlin at the address shown below. Tips and procedures on reporting claims can be found on the back of this form. Any claims questions can be answered by contacting the Claim Helpline at **877.791.3777**.

Firm Name: _____ Broker: _____
Contact Name: _____
Address: _____
City: _____ State: _____ ZIP: _____
Phone: _____ Fax: _____ Email: _____

Policy #: _____ Policy Period: _____
Name of Claimant: _____ Date of Occurrence/Closing: _____
Address of Property Involved: _____
Name of Agent Involved: _____
Type of Agent: Listing Selling Buyers Dual
Has the suit been received? Yes No Date of Service: _____

Specific Nature of Incident: _____

Note: Include type of demand (verbal or written) for damages that may result, and a copy of all written demands/legal documents if a lawsuit has been initiated/served.

Requested by: _____
Signature: _____ Date: _____

Mailing Address: **Rosanna Marra**
Senior Claims Technician
XL Catlin – Commercial E&O Claims
100 Constitution Plaza, 15th Floor
Hartford, CT 06103

Phone: **877.791.3777**
Fax: **860.548.9668**
Email: **rosanna.marra@xlcatlin.com** or
vincent.catania@xlcatlin.com



Pearl Insurance's E&O program is underwritten by Greenwich Insurance Company and Indian Harbor Insurance Company, rated "A" (excellent) by A.M. Best. Our program is sponsored by over 20 national, state, and local real estate associations. In addition to providing state-of-the-art risk management tools and services to help you reduce your potential liabilities, we also offer many other innovative coverage features. Please contact a Pearl Insurance representative for a description of policy coverages, amounts, conditions, limitations, and exclusions.

REALTORS® Claim Report Tips & Procedures

- Your policy requires that immediate written notice be given to the insurance company as soon as possible after receiving notification of a claim or potential incident.
- Please complete the enclosed Claim Report and forward with all demands, suits, or other papers immediately to the address on the Claim Report. If reporting an incident, the following information should be available (though there is no need to include it with your initial report or letter).
- Create a claims/incident file consisting of the following for use by the claim department and its representatives:
 - Listing agreement
 - Sales contract
 - Closing documents
 - Any correspondence, notes, and phone messages related to the incident
 - Copies of any written/oral side agreements with the claimant or codefendant
- All parties involved with the claim/incident should prepare a chronological history of their participation and their understanding of the activities surrounding the claim/incident.
- Do not discuss the matter with anyone other than representatives of your insurer.
- Do not produce any of your records relative to this incident for inspection without clearance and/or approval from the insurer.
- The insurance company will retain appropriate counsel and will communicate with the named insured for all information regarding the event.

If you currently have the Deductible Reduction Endorsement JPP116 on your policy declarations page, please send the following documents in order for the endorsement to apply:

- A copy of the seller disclosure form that was signed by the seller and acknowledged in writing by the buyer prior to closing.
- Proof that a home warranty policy was purchased between the time the residential property was listed and up to and including 30 days after closing.
- A copy of the accredited written property inspection report that was performed on the property or a waiver of inspection in writing from the buyer.
- A copy of the sales contract that was utilized.



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