

**NATIONAL LIFE GROUP – INDEPENDENT AGENTS  
ERRORS AND OMISSIONS PROGRAM  
EXTENDED REPORTING PERIOD REQUEST FORM  
FOR RETIRED AND DISABLED AGENTS  
ALSO FOR ESTATES OF DECEASED AGENTS**

**Policy Period: May 1, 2020 to May 1, 2021**

The following Extended Reporting Periods are available to an Agent who becomes disabled or retires from the business of providing Professional Services during the above referenced policy period. An ERP is also available for purchase by the estate of a deceased agent.

**Automatic Extended Reporting Period:**

Coverage automatically ceases on the date an Agent's contract terminates. There will be no return of premium because an automatic Extended Reporting Period is provided to the Agent or the legal representative of a deceased Agent for one (1) year after the date of termination of the Agent's contract with National Life/ESI for reason of disablement, retirement or death. During that one (1) year period, the Agent may report any Claim which was first made during said one (1) year period and arises out of any negligent act, error, omission, or Personal Injury which occurred on or after their Retroactive Date and before the date of termination of the Agent's contract. The Agent shall not be entitled to an automatic Extended Reporting Period if the Agent has any other applicable E&O insurance.

**Conditional Automatic Extended Reporting Period:**

Notwithstanding the automatic Extended Reporting Period listed above, a conditional unlimited Extended Reporting Period is provided to an Agent whose contract is terminated for disablement, retirement, or death, as long as the National Life Group sponsored E&O program is continuously written with Markel American Insurance Company. The conditional Extended Reporting Period provides the Agent with the ability to report Claims which are otherwise covered by the policy.

**Optional Extended Reporting Period:**

Retired or disabled Agents or the estates of deceased Agents have the option of increasing the automatic one (1) year Extended Reporting Period to three (3) years, five (5) years or an unlimited amount of time for additional premium. Election of an optional Extended Reporting Period means the Agent will have an Extended Reporting Period beyond the automatic one (1) year that is not contingent upon the National Life Group sponsored program being continually serviced with Markel. This form and the applicable additional premium must be submitted to CalSurance® within sixty (60) days of the effective date of the Agent's contract termination.

The Extended Reporting Periods do not reinstate or increase the limits of liability beyond the limits shown on the Declarations, nor do they extend the Policy Period. Claims which are properly reported during an Extended Reporting Period will be deemed to have been made on the last day of the Certificate Period.

Please note that you must pay the premium associated with the limits of liability that you had in effect at the time of your contract termination. Please contact **CalSurance®** Customer Care at 866-226-9308 to verify your premium due.

**I wish to purchase the following optional Extended Reporting Period:**

- ☐ Three (3) years from the date of contract termination for an additional premium of \$1,102.
- ☐ Five (5) years from the date of contract termination for an additional premium of \$1,653.
- ☐ An unlimited amount of time from the date of contract termination for an additional premium of \$2,204.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

NPN #: \_\_\_\_\_ Contract Termination Date: \_\_\_\_\_ ERP Premium Due: \$ \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Additional premium for the optional Extended Reporting Period must be paid in full by check. Please make checks payable to **CalSurance Associates** and mail with this form to:

**CALSURANCE ASSOCIATES  
A DIVISION OF BROWN & BROWN PROGRAM INSURANCE SERVICES, INC.**

P.O. Box 7048  
Orange, CA 92863

**Phone 866-226-9308 ☆ Fax 800-607-6875 ☆ Email: [info@calsurance.com](mailto:info@calsurance.com)**