



RLI Insurance Company
 P.O. Box 3967 Peoria IL 61612-3967
 Phone: 309-692-1000 Fax: 309-692-8637

Pension/Profit Sharing Trust (Erisa) Bond Application

APPLICANT INFORMATION	Applicant (Provide Exact Name of Plan)						
Business Address			City		State	Zip	Year Business was Established
Describe the Products or Services of Your Business or Activity				Previous Surety Company		Reason for changing Bonding Company	
BOND INFORMATION	Amount of Bond		Effective Date		Premium Payments <input type="checkbox"/> Three Years in Advance <input type="checkbox"/> Annually		
UNDERWRITING INFORMATION	Total Assets in the Plan (Bond amount should equal 10% of plan assets)						
Does the fiduciary invest any of the trust funds in the employer's business? <input type="checkbox"/> Yes <input type="checkbox"/> No				Are regular outside audits conducted on the plan? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Does plan employ an independent administrator or financial advisor? <input type="checkbox"/> Yes <input type="checkbox"/> No				What percentage of plan's assets are invested in non-qualified investments?			
AGENT/BROKER INFORMATION	Agent/Broker Name		Code	Phone No.	Fax No.	City	State Zip
AGENT'S RECOMMENDATION				COMMENTS			
<input type="checkbox"/> We are not very familiar with this applicant. <input type="checkbox"/> We are familiar with applicant and are aware of no adverse information about him/her. <input type="checkbox"/> We know applicant very well and offer our highest recommendation.				<hr/> <hr/> <hr/>			