

EXCLUSIVE POLICYHOLDER BENEFITS

NO-COST ADVICE HOTLINES

General Risk Management

Direct access to professional advisors who deal exclusively with the concerns and issues facing CPAs. Our specialists are available to help policyholders on a variety of risk management topics, including client screening, documentation, engagement and disengagement letters, and more.

Tax Advice

Receive guidance and advice on federal tax issues and potential problems associated with high-risk corporate, estate, and gift tax work. CAMICO can review your firm's fully researched tax treatment of a complex transaction, discuss possible alternate treatments, and highlight other issues relative to the facts provided.

Accounting & Auditing Advice

Services include guidance on a variety of accounting and auditing issues, including the application of Statements on Auditing Standards (SASs); Statements on Standards for Accounting and Review Services (SSARS); quality management, going concern considerations, independence, conflicts of interest, and other matters addressed by the AICPA Code of Professional Conduct.

Subpoena Services

CAMICO has a team of specialists available to assist with subpoenas and requests for information. When warranted, this may include assistance for policyholders by counsel when responding to legal processes such as civil subpoenas; advice in connection with criminal and grand jury subpoenas; and responding to regulatory or third-party requests for information.

NO-COST CPE

Receive no-cost training and NASBA-accredited CPE with a risk management focus through educational opportunities that are available to all members of a policyholder firm.

- Webinars (approx. 20 CPE credits per year)
- Live in-firm presentations to groups of 40 and up*
- Speakers Bureau
- Online self-study courses

* Firms with smaller audiences are welcome to contact Loss Prevention at lp@camico.com to schedule a webinar or livestream presentation specifically for their firm.

Get in Touch

CAMICO

1800 Gateway Drive, Suite 200, San Mateo, CA 94404

T: 800.652.1772 | E: inquiry@camico.com | W: www.camico.com

MEMBERS-ONLY SITE

You'll find a wealth of practice and risk management resources on the CAMICO Members-Only Site. It contains documents organized by risk management area and includes 150+ sample letters, 250+ articles, resource centers, and more.

POTENTIAL CLAIM COUNSELING

Experienced specialists provide counseling on potential claims in order to avoid a matter turning into a claim or to reduce its impact. Potential claim expenses such as attorneys' fees are not charged against the deductible or policy limit. Early reporting may qualify policyholders for a 50% reduction in deductible up to \$50,000.

EXPERT CLAIMS ASSISTANCE

In the event that a matter turns into a claim, CAMICO is with you every step of the way. Claims Specialists will guide you through the process and will develop a plan of action to resolve the matter efficiently and equitably.

CAMICO PARTNERSHIPS

- CAMICO partner Scherzer International offers preferred pricing for prospective client investigation services and new hire employee background checks
- CAMICO offers value-added resources to our policyholders with Employment Practices and Cyber coverage

LEARN MORE



camico.com



This information is provided as a general overview and is not intended to be a complete description of all applicable terms and conditions of coverage. Actual coverages and risk management services and resources may vary and are subject to policy provisions as issued. Accountants Professional Liability Insurance may be underwritten by CAMICO Mutual Insurance Company or through CAMICO Insurance Services by one or more insurance company subsidiaries of W. R. Berkley Corporation. Not all products and services are available in every jurisdiction, and the precise coverage afforded by any insurer is subject to the actual terms and conditions of the policies as issued. CAMICO Services, Inc., dba CAMICO Insurance Services. License CA# 0C09618. ©CAMICO. All Rights Reserved. CMIEPB052026