

The following confidential ownership statements may be used only in establishing premiums for any of your insurance coverages. It is extremely important that all questions be answered completely. The standard workers' compensation policy requires that you must report ownership changes, and other changes as detailed below, to your insurance carrier in writing within 90 days.

PURPOSE (Check one)

- This is a request for current ownership only. **Please fill out columns indicated.**
- New entity established. **Complete column A only.**
- Name change only. **Complete column A for former entity & column B for newly named entity.**
- Combination of separate entities. **Complete a separate column for each entity related through common ownership. (Attach additional forms if necessary).**
- Sale, transfer or conveyance of all or a portion of an entity's ownership interest. **Complete column A for ownership before the change and column B for ownership after the change.**
- Merger or consolidation of two or more entities (attach copy of agreement). **Complete columns A & B for the former entities and column C for the surviving entity.**
- Formation of a new entity subsequent to the dissolution or non-operative capacity of an entity. **Complete column A for the dissolved or non-operative entity and column B for the new entity.**
- Sale, transfer or conveyance of an entity's physical assets to another entity which takes over its operations. **Complete column A for the former entity and column B for the purchasing entity.**
- Voluntary or court-mandated establishment of a trustee or receiver, excluding a debtor in possession, a trustee under a revocable trust or a franchisor. **Complete column A for ownership prior to the change, and column B for the trustee or receiver established.**

INFORMATION	A	B	C
Name & street address of entity (PO box numbers are not acceptable)			
Legal Status of Entity: (Corporation, Partnership, Sole Proprietor, Trustee, Individual, Other)			
Ownership: <u>Corporations</u> - list names of owners of 5% or more of voting stock and number of shares owned. (Submit shareholder proposal if transaction involved exchange of stock) <u>Partnerships</u> - list each general partner and appropriate share in the profits. <u>Other</u> - If no voting stock, list members of board of directors or comparable governing body.			
Total shares of voting stock issued.			
Date of ownership change, acquisition or combinability.			
Carrier, policy number and effective date.			
Experience rating identification number (carrier use only)			

