

Firm Name Change:

Copy the Policy Number from the Firm Name Change Task and enter into **Maintain Docs** — Check if the task is a duplication

Policy #*	LP101310	Retrieve Data
Document Type*	Customer Request	Lookup
Document Class*	Firm Name Change	
Document Category*	Adjustments - CAT A	▼

*****If there is a duplicate task in Maintain Docs:** copy the doc ID (in **Maintain Docs**) – Click Add Comment

Add note "See Doc ID: _____ - this is a duplicate (Enter Twice) Will PIF" (as formatted below):

EX:

Add your comments below

See Doc ID: 3031850222 - this is a duplicate

Will PIF

Once confirmed that there are no duplicates continue the steps below. Look at the firm's new letterhead and verify the address & phone numbers in **Database**

General Info	Insurance History	Firm & Staff Info	Areas Of Practice	Client Information	Risk M
Forms Management	Renewals	History			

Policy Information:			
Form Submit ID:	20120904151437445LAW--9	Policy Number:	LP101310
Requested Effective Date:	09/14		
Underwriting Review	<input type="checkbox"/>		
Marketing Opt-Out	<input type="checkbox"/>		
Risk Retention Group	<input type="checkbox"/>		

Business Information:			
Firm Name:	Law Offices of Russo & Prin	Suite:	230
Street Address:	1 Harbor Ctr	City:	Suisun City
State:	CA	Zip Code:	94585-2427
County:	Solano	Business Fax:	(707) 427-1233
Business Phone:	(707) 427-6777	Number of Attorneys	5
Email:	leslieprince@russoandprince		



January 3, 2023

Jeanne Gustke
Executive Vice President
RJW Professional Insurance Services
PO Box 14765
Oakland, CA 94614

RE: RUSSO & PRINCE, LLP

Dear Ms. Gustke:

As discussed by email, this letter shall serve to confirm that our firm name will be changed to RUSSO, ELMS, ROBERTS, LLP effective January 1, 2023. Our old email address is still active, but you may use my new email address going forward: russo@rerfamilylaw.com. Please see letterhead enclosed.

Thank you for your assistance.

Very truly yours,

LAW OFFICES OF RUSSO & PRINCE, LLP

Sarah B. Russo
Attorney at Law

We must have an effective before updating all systems. Check that the effective date of change is provided

RE: RUSSO & PRINCE, LLP

Dear Ms. Gustke:

As discussed by email, this letter shall serve to confirm that our firm name will be changed to RUSSO, ELMS, ROBERTS, LP effective January 1, 2023. Our old email address is still active, but you may use my new email address going forward: srusso@rerfamilylaw.com. Please see letterhead enclosed.

Thank you for your assistance.

Very truly yours,

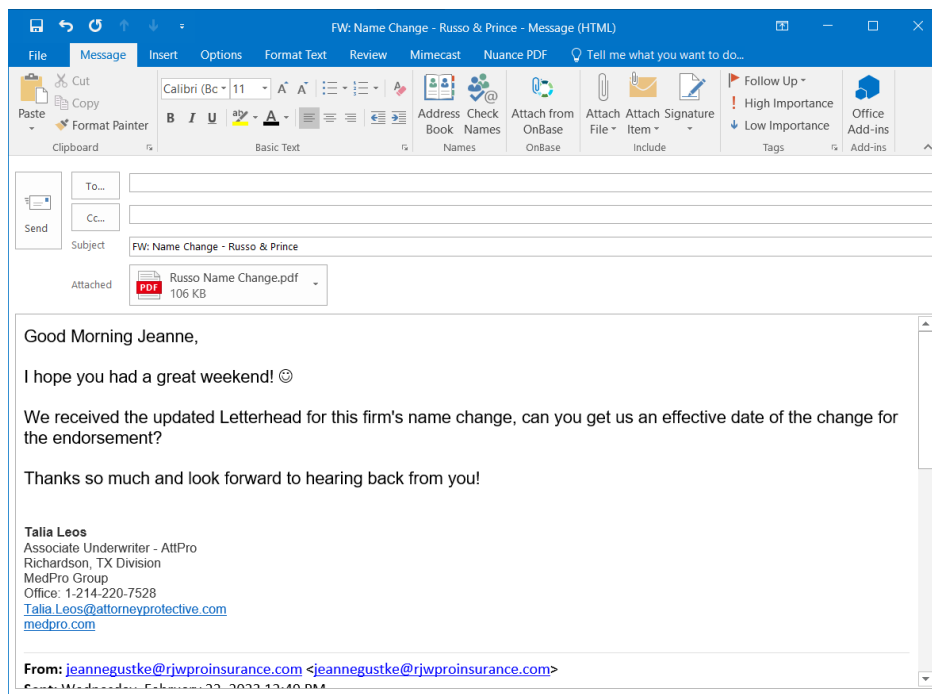
LAW OFFICES OF RUSSO & PRINCE, LLP



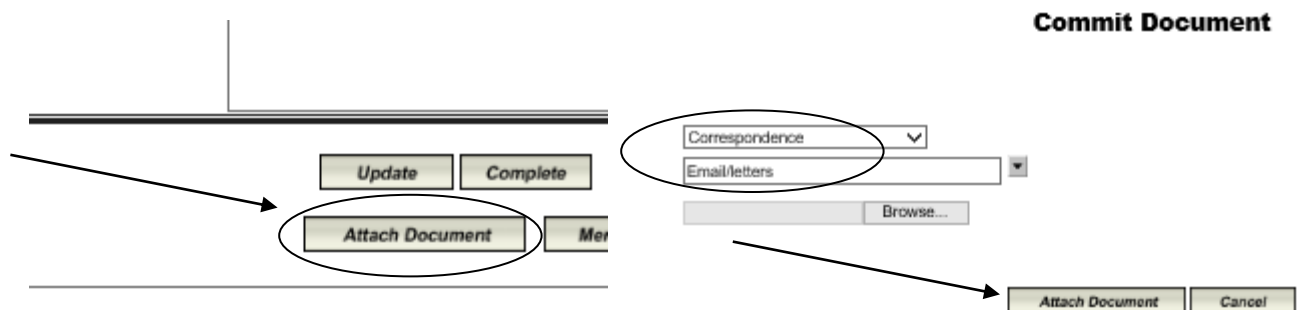
Sarah B. Russo
Attorney at Law

*****If the Effective Date of Change is not provided** - Email the agent and request the effective date of the firm change name (we do not need an effective date for phone numbers).

EX:



Go to the Task in **Induction** – Attach the email sent to the DP to the file



Add comment: "EM DP requesting the effective date of the firm name change"

Comments Entered

Add your comments below

EM DP requesting the effective date of the firm name change

Add Comments Cancel Close

Under the 'Followup Date' box insert the date 1 week from today's date

*****If you do not hear back with the effective date within the week:** follow up with the DP and repeat twice until you receive the effective date of the firm name change. If no response after the 3rd Follow-up add note no response from the DP and push the task to the AUW Customer Pool.

Received Date	02/28/2023
Policy Effective Date	09/14/2022
Adjustment Effective Date	
Followup Date	03/07/2023

Read the body of the email and/or letterhead for additional information such as change in AOPs, number of attorneys, etc.

*****If there are other changes to the policy that need to be made:** Email the agent for additional information or attach to the renewal file and forward to the UW.

Locate the policy number in **Database** - copy the existing firm name and scroll down to Predecessor Firms – Click on edit and paste the old firm name and add date of dissolved (Effective Date of Change) – click update

Predecessor Firms:

Name Of Firm	Date Formed	Date Dissolved	
Law Offices of Russo & Prince		01/2021	Edit
			Edit
			Edit

Add Firm

→ **Update** **Close**

Firm Information:

* Name of Firm: **Law Offices of Russo &**

* Date Formed: * Date Dissolved: **01/2021**

% of Assets: % of Liabilities:

of Attorneys:

* Indicates required field

Update the firm's name with the new name

Business Information:

Firm Name:	Russo, Elms, Roberts, LLP	Suite:	230
Street Address:	1 Harbor Ctr	City:	Suisun City
State:	CA	Zip Code:	94585-2427
County:	Solano	Business Fax:	(707) 427-1233
Business Phone:	(707) 427-6777	Number of Attorneys:	6
Email:	leslieprince@russoandprince		

Go to [Oasis](#): Click the Policy Actions drop down window – select Policy Change

Policy Actions

- Agent
- Application Info
- Auto Renewal
- Billing Setup
- Cancel
- Claims Summary
- Convert Coverage
- Copy to Indication
- Copy To Quote
- Document Processing
- Endorsement Window
- Extend Cancel
- File Notes
- Files
- Form Letter
- Letters
- Multi Cancel
- OOS Policy Change
- Policy Change**
- Premium
- Transaction
- View Non Premium
- IBNR Inactive Window

Policy Type: Att P
Status: Activ
Exp Date: 09/14
Issue State: CA
Ren Rsn:

In the Pop up window: Add the **Effective date** - In the Endorsement drop down window, select **Chg Name/Address** - Add in the Comment Box: "Eff MM/DD/YYYY Updated firm's name" – click OK

Endorse Policy || Print || Help |

Endorsement Information

Effective: 01/01/2023

Accounting: 02/28/2023

Endorsement: Chg Name/Addr

Comment: Eff 01/01/2023 Updated Firm's Name

OK Cancel

Click on the Firm's name under 'Pol Admin' – In the pop up window click 'Go To Client'

Pol Admin: Law Offices of Russo & Prince, LLP
Issue Co. National Liability and Fire (AttPro)
Producer/Agency: RJW Professional Insurance Services
Sub-Producer/Agent:
Select Term: 09/14/2022 - 09/14/2023

Go To Client Close

In the Pop up window, add the firm's new name under the Organization Name and Long Name box – click on Save Changes – Click on Refresh

Organization: Russo, Elms, Roberts, LLP Files Back to Entity List Print

Summary Demographic Background Relation Vendor Prior Carrier Agent

Client

Client Type: Organization Discarded:

Client ID: 0001241084 Organization Name: Russo, Elms, Roberts, LLP Long Name: Russo, Elms, Roberts, LLP

DOI: TIN: SSN: IDOI Provider ID: NPI: E-Mail Address 1: leslieprince@russoandpri E-Mail Address 2: Marketing Opt-Out:

Insured Since: 09/14/2017 Loss Free: 09/14/2017 Ins Co. Bus Segment Codes: URL: www.russoandprince.com

Legacy ID: LPL_73LPL101310-4_0 DBA Name: Claims Free: Legal Name: Refresh Save Changes Sp Handling DDL Client ID Maintain Duplicates

Name History

Click on Background – select 'Predecessor Firm'

Organization: Russo, Elms, Roberts, LLP Files

Summary Demographic Background Relation Vendor

Client

Client Type: Organization

Client ID: 0001241084

Certification License Predecessor Firm

Organization Name: Russo, Elms

Click on Add – Add the Firm's old name – add the Effective date of change – click save – click refresh – Close out of the window

Organization: Russo, Elms, Roberts, LLP Files [Back to Entity List](#)

Summary Demographic Background Relation Vendor Prior Carrier Agent

Predecessor Firm for Russo, Elms, Roberts, LLP

Predecessor Firm List

Add Delete

2 records, Page 1 of 1

	Name	From	
<input type="checkbox"/>	Law Offices of Russo & Prince	01/01/2021	01/01/3000
<input type="checkbox"/>	Law Offices of Russo & Prince, LLP	01/01/2023	01/01/3000

Detail

Predecessor Firm Name: Law Offices of Russo & Prince

Effective Date: 01/01/2021 Expiration Date: 01/01/3000

Refresh Save

Click close on the Policy Admin window – click rate (rate should not change) – click OK okay on the pop up window – click save WIP (*Note: you may have to select Save WIP x2 – until you see the firm's name actively change next to the 'Pol Admin:')

Go To Client Close

Rate Save WIP Save Options

x2

Pol Admin: Russo, Elms, Roberts, LLP

Issue Co. National Liability and Fire (AttPro)

Producer/Agency: RJW Professional Insurance Services

Sub-Producer/Agent:

Select Term: 09/14/2022 - 09/14/2023

Go back to **Induction** and add the Comment:

"Effective (date of change) changed firm name to: (New Name)

Add as pred firm: (Old Name)

No change in premium"

Click on Add comments – click close

EX:

Comments

Eff 01/01/2023 changed firm name to: Russo, Elms, Roberts, LLP
New name of firm: Russo, Elms, Roberts, LLP
Add as pred firm: Law Offices of Russo & Prince, LLP
The old firm name: Law Offices of Russo & Prince, LLP
No change in premium

Go to the Policies folder under the G drive – find the Firm Name-Address endorsement and fill out with:

1. Policy number
2. First Named Insured (the firm's old name)
3. Effective date the change
4. Item 1: Named Insured (the firm's new name and current address)
5. Item 2: Pred Firms (the firm's old name - ***If there are multiple pred firms - list them all on the endorsement)

Save under the old firm's name

LP101310 Law Offices of Russo & Prince, LLP 01.01.2023 NLF_ATY-1017-00-0116 - Firm Name_Address [Compatibility Mode] - Word

Issuing Company:
National Liability & Fire Insurance Company
Stamford, Connecticut

CHANGE ENDORSEMENT

Forming Part of Policy No.: LP101310

First Named Insured: Law Offices of Russo & Prince, LLP

Effective Date of Endorsement: 01/01/2023 at 12:01 a.m. Standard Time at the address of the First Named Insured.

In consideration of the payment of the additional premium due, if any, and in reliance upon the representations of all **Insureds**, we and you agree to amend the policy as follows:

It is agreed and understood that the **Named Insured's** name and/or address in the Declarations has been amended to reflect the following:

ITEM 1	NAMED INSURED:	Russo, Elms, Roberts, LLP
	ADDRESS:	1 Harbor Ctr, Suite 230 Suisun City, CA 94585-2427
ITEM 2	PREDECESSOR FIRMS:	Law Offices of Russo & Prince Law Offices of Russo & Prince, LLP

Go to Induction & Forward task to the Audit SME pool

Question Reasons - Profile 1 - Microsoft Edge

https://imaging.medpro.com/imaging/questionReason.do?

Question Reasons

Question: AUDIT SME

Name: Select One

Reason: Broker Change
Effective Date/Policy Period Discrepancy
Need to Attach Document
Other
Peer Review

Comments: Endorsement ready in 2023 NLF folder

Go **Cancel**