

**INTERNATIONAL FIDELITY INSURANCE COMPANY**

2999 Oak Road, Suite 820, Walnut Creek, CA 94597

Tel: (925) 256-8760 Fax: (925) 256-1080

**APPLICATION FOR CALIFORNIA ERISA BOND  
Employee Retirement Income Security Act of 1974**

**\*INFLATION GUARD CLAUSE INCLUDED IN BOND COVERAGE\***

Agent: \_\_\_\_\_ Bond No. \_\_\_\_\_

Name of Plan(s) to be covered: \_\_\_\_\_

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

Effective Date of Bond: \_\_\_\_\_ #Trustees \_\_\_\_\_

Total Plan Assets: \$ \_\_\_\_\_ Total "Non-Qualifying" Assets \$ \_\_\_\_\_  
(If more than 5% of total assets are "non-qualifying", Inflation Guard Coverage is not offered. Submit to Company with Form 5500, Schedule I)

Amount of Bond: \$ \_\_\_\_\_ (If over \$250,000, attach Form 5500, Schedule I)  
(Maximum \$500,000.)

Have you sustained any employee dishonesty losses in the last six (6) years? Yes  No   
Is your Plan audited by a CPA? Yes  No

THREE YEAR PREMIUMS BASED ON 5 OR LESS TRUSTEES. BOND AMOUNT SHOULD BE 10% OF AMOUNT OF ASSETS IN PLAN PLUS PROJECTED GROWTH OVER THE THREE YEAR TERM.

<u>Bond Amount</u>	<u>3 Year Premium</u>	<u>Bond Amount</u>	<u>3 Year Premium</u>
\$10,000	\$100	\$125,000	\$256
\$15,000	\$100	\$150,000	\$269
\$20,000	\$112	\$200,000	\$293
\$25,000	\$127	\$250,000	\$316
\$30,000	\$136	\$300,000	\$340
\$40,000	\$155	\$350,000	\$365
\$50,000	\$174	\$400,000	\$388
\$75,000	\$216	\$450,000	\$411
\$100,000	\$242	*\$500,000	\$427

(\* \$500,000 limit does not include Inflation Guard Coverage as this is the maximum limit of liability under our Bond.)

For amounts not included above, or for more than 5 Trustees, please call the Company for rates.

The above rates include Inflation Guard Coverage. This coverage automatically provides a limit of liability equal to that required by ERISA, provided that the Applicant purchases the required limit of liability at the inception date of the Bond. This feature eliminates the need to request increases in the bond limit during the three year premium period, and assures compliance with the ERISA requirements.

Signed By: \_\_\_\_\_ Date: \_\_\_\_\_

Applicant \_\_\_\_\_ Agent/Broker \_\_\_\_\_