

## *Highlights of the enhanced features offered under the CPA Program*

### **The CPAOnePRO Hotline is designed to assist accountants with all of the following:**

- ▶ Advice on early claim intervention
- ▶ Suggestions for appropriate limitation language for engagement letters or client fee-for-service contracts
- ▶ Best practice consultation for maintaining client relationships

### **Claims Triage is used to quickly assess the following attributes of a subpoena, incident or claim:**

- ▶ Nature and facts of the reported matter
- ▶ Potential damages
- ▶ Possibility of facts to mitigate damages
- ▶ Possible outcomes
- ▶ Possible defenses
- ▶ Need for experts

*We are pleased to formally introduce Attorney Ralph Picardi, who has served as our Risk Management Consultant for the last 15 years.*



- ▶ Ralph graduated cum laude from University of San Diego School of Law, where he served on the editorial board of the Law Review. He graduated magna cum laude from Boston College School of Management with a B.S. in Accounting.
- ▶ His legal practice concentrates primarily on the area of defending accountants, lawyers and other professionals in matters of professional liability. In addition to litigation, Ralph specializes in advising accountants, lawyers, and their insurers in matters of coverage, and in matters of loss control through hotlines, seminars, risk management audits and publications.
- ▶ He is a current member of the American Institute of Certified Public Accountants, the Massachusetts Society of Certified Public Accountants and the Professional Liability Underwriting Society.