



## Modify an Existing Proposal

Fidelity limit is required in order to provide a proposal. The limit is established by the lending industry standard of "Three times monthly assessments, plus total cash assets".

### Your Information

Name (First, Last): \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Fax Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

### Management Firm Information

Firm's name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

### HOA Information

Name of HOA: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Requested Effective Date: \_\_\_\_\_

Does the HOA currently carry Fidelity coverage? Yes No

Have there been any losses discovered/sustained  
in the last six (6) years? Yes No

*if yes, please describe details of loss and corrective measures taken*

Requested Fidelity Limit: \_\_\_\_\_

Deductible: \_\_\_\_\_

Is the management company listed as a named insured  
on the current fidelity? Yes No

**Modify this Proposal by faxing or emailing this form to  
(619) 593-2008 • info@masterfidelity.com**