



THE LEGACY FUND

Corporate Account Designation Form

By default, Legacy Fund accounts are created as individual accounts in the name of the Member. Any distribution or activity related to the account is directed toward the individual Member.

However, Curi offers the option for Legacy Fund accounts to be created as corporate accounts.

The following are considerations and implications when establishing a corporate account in lieu of individual Member accounts:

1. The corporate account can be established only in the name of the medical practice associated with the individual Member’s Curi medical malpractice insurance policy. The medical practice must be a covered entity on the Member’s policy.
2. A corporate account is an “all-or-nothing” option. If a corporate account is selected, all individual Members associated with that medical practice must be included in that corporate account. No individual Members associated with that medical practice will hold an individual Legacy Fund account.
3. Any distribution of Legacy Fund account funds will be paid to the corporate account holder and not to the associated individual Members.
4. Once a corporate account is established, the medical practice will not be able to elect, or revert to, individual Member accounts in the future.

Please establish a Corporate Legacy Fund account

Full Legal Name of the Practice _____ Policy No. _____

Policyholder Address _____

Contact Name _____ Telephone No. _____ E-mail Address _____

Must be signed and dated by two representatives authorized to act on behalf of the Members, except for solo practitioners where only the signature of the solo practitioner is required. You may return the completed form via email at TLF@curi.com or mail a physical copy to: Curi, attn: TLF, 700 Spring Forest Road, Suite 400, Raleigh, NC 27609.

By: _____ By: _____
Signature Date Signature Date

Print Name/Title of Authorized Representative

Print Name/Title of Authorized Representative