



Name Standardization Process

Rules for Policies Effective December 31, 2016, and Earlier

Application of Abbreviations			
Received As: (and any variations*)	Abbreviation to Apply:	And:	Comments:
Also Known As*	AKA	Move to the end of the name	
Also Trading As*	ATA		
And	&		
And/or*	&/OR		
Association	ASSN		
Certified Public Accountant*	CPA		
Company Companies	CO		
Corporation	CORP		
Doing Business As*	DBA	Move to the end of the name	
Et Al*	Etal	Drop all info following	
Et Cetera*	Etc		
Formerly Known As*	FKA	Move to the end of the name	
General Contractor General Contractors	GC		Only abbreviated when reported at end of name
General Partner General Partners	GP		Only abbreviated when reported at end of name
Incorporated Incorp Incorporation	INC		
Leased Clients For* Leased Company For*	LCF	Move to the end of the name	
Leased Workers For*	LWF		
Limited	LTD		Only abbreviated when reported at end of name
Limited Liability Company* Limited Liability Corporation*	LLC		
Limited Liability Partnership	LLP		
Limited Partnership	LP		
Professional Association	PA		
Project	PROJ		Only abbreviated when reported at end of name
Trading As*	TA	Move to the end of the name	



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Handling of Special Characters				
Character(s)	Keep?	Keep Only When:	And:	Reason/Comments
) } } ! " * ? \ _ ~ + < + > # , : ^ `	No			
-	No		Replace with space	
; (semi-colon)	No			
Excess Spaces	No		Single Space	
\$		It is immediately followed by a number		e.g., \$1.00 Stores
&		It is not the first or last character in a name field		
. (period)		It is between any two Alphanumeric (A/N) characters (no spaces)		New tech-age names
/		It is not the first or last character in a name field		
@		It is not the first character followed by a space in a name or it is not the last character in a name		New tech-age names.
¢		It immediately follows a number		e.g., 99¢ Stores
' (apostrophe)	Yes	Always		

Handling of Excess Verbiage			
Character(s) (and any variations*)	Keep?	Keep Only When:	And:
{ ([	No		Drop all info following
(...) [...] {...} *	No		Drop all info between these two characters except (k) when preceded by 401
Numbers only (e.g., 12345) FEIN #####	No		
Attention:* Care Of*	No		Drop all info following
Named Insured Insured Name	No	Delete only these two words	
Per WC	No		Drop all info following
Reinstated	No		Drop all info following
See End, See Endorsement*	No		Drop all info following
See Extension Information Page*	No		Drop all info following
%		Keep if it immediately follows a Number	Otherwise, drop % and all info following



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Name Splitting			
Character(s)	Name Split Indicator	Use as Name Split Indicator Only When:	And:
"A subsidiary of", "FKA", "Of" following INC, CO, CORP, LLP, LP, LTD, LLC, ASSOC, ASSN	No	Don't split until next Name Split Indicator is reached	
GC, GP, PA, PROJ		It immediately follows: INC, CO, CORP, LLP, LP, LTD, LLC, ASSOC, ASSN	
& OR &/OR	Yes	It follows INC, CO, CORP, LLP, LP, LTD, LLC, ASSOC, ASSN, GC, GP, PROJ, Joint Venture, or A Joint Venture	Move to end of name
Assoc, Assn, CO, CORP, INC, LLC, LLP, P, LTD	Yes	It is not immediately followed by: INC, CO, CORP, LLP, LP, LTD, LLC, ASSOC, ASSN, GC, GP, PROJ, OF, Joint Venture, or A Joint Venture	
AKA, ATA, DBA, LCF, LWF, TA	Yes	It is not the first three (or two) characters	Always move to end of name
Joint Venture A Joint Venture	Yes	Split after Venture when it follows INC, CO, CORP, LLP, LP, LTD, LLC, ASSOC, ASSN, GC, GP, PROJ	

Handling Non-Names	
When only the following appear in a Name field, remove the wording	
&	GP
&/OR	INC
A subsidiary of	A Joint Venture
AKA	Joint Venture
ASSN	LCF
ASSOC	LLC
ATA	LLP
CO	LP
CORP	LTD
CPA	LWF
DBA	OR
Etal	PA
Etc	PROJ
FKA	TA
GC	Only one character in the name field