



Professional Indemnity Proposal Form

**GB UNDERWRITING PROPOSAL FORM:
PROPERTY PROFESSIONALS AND CHARTERED SURVEYORS PROFESSIONAL INDEMNITY**

The following basic information **MUST** be supplied and the declaration signed.

1. Full name of Proposer (name or names you or your business trade under):

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2. Full Business address:

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..... Postcode:

3. Website address:

4. Please provide a full description of your activities (with percentage breakdown by activity):

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5. Are you a member of any association or professional body? Please list below. Yes No

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6. What date was the business established: DD/MM/YY

Or number of years' experience if a Sole Trader: years

7. Please provide details of all partners, principals and directors:

Name	Age	Professional Qualifications	Number of years' relevant experience
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8. Please provide number of other professionally qualified staff:

9. Please provide your fee or turnover details for:

Your last financial year: £

Your next financial year: £

10. Please provide a percentage break down of your fee or turnover by territory:

United Kingdom: %

European Union: %

USA / Canada: %

Other Territories: %

11. Please provide a percentage split of your business activities over the past year:

Architectural: %

Asbestos Survey: %

Auctioneering: %

Building Society Agency or Insurance Commissions: %

CDM Planning Supervision: %

Estate Agency - Commercial: %

Estate Agency - Residential: %

Expert Witness/Adjudication/Arbitration: %

Land Surveying: %

Project Management: %

Property Management: %

Quantity Surveying: %

Rent Reviews/Lease Renewals - Commercial: %

Rent Reviews/Lease Renewals - Residential: %

Survey and Valuation - Commercial: %

Survey and Valuation - Residential: %

Town Planning: %

Other (please specify): %



12. In the past five years have you undertaken, or do you plan in the future to undertake any contracts for:

- Airports or Railways: Yes
- Amusement Rides: Yes
- Bridges/tunnels/highways/mines: Yes
- Chemical/petrochemical/refineries: Yes
- Foundations or Underpinning: Yes
- Harbours/jetties/dams/sea defences: Yes
- Manufacturing or Power Plants: Yes
- Nuclear or Atomic Works: Yes
- Setting Out: Yes
- Sewerage or Water Schemes: Yes
- Swimming Pools: Yes

If you have ticked any of the above, please provide full details:

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13. Please provide details of your three largest contracts in the last twelve months:

Client name and description of work	Total Contract Value (£)	Your Contract Value (£)	Start date (DD/MM/YY)	Completion date (DD/MM/YY)
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14. Do you always use letters of engagement detailing your scope of activities? Yes No

15. Do your standard contract conditions limit your liability? Yes No

16. What Indemnity limit do you require? £250,000 £500,000 £1,000,000 Other

17. Current insurance details:

Renewal date:

Insurer:

Limit and deductible:

Premium: £



18. If you currently have Professional Indemnity cover in force, please advise of the retro date (if any):

19. Have you had any Professional Indemnity claims within the last five years? Yes No

(This includes any claim, prosecution, proceedings or investigations against you whether successful or not)

20. If "Yes" please provide full details:

Date claim made	Details	Paid (£)	Outstanding amounts (£)	Date settled
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22. Are you or any partner, principal, director or employee AFTER FULL ENQUIRY aware of any circumstance or incident which may result in any claim against your business, its predecessors or any past or present partner, principal, director or employee?

Yes No

If "Yes" please provide details:

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23. PLEASE READ THIS SECTION CAREFULLY BEFORE YOU SIGN THE DECLARATION

The information that you have provided to us forms the basis of your insurance policy. It is important that you advise us of all material information, and immediately of any change in information. Please note if you are in doubt whether or not any information is material, it should be disclosed. Failure to disclose information may prejudice your rights in the event of a claim.

A material fact is one that is likely to influence an Underwriter's judgement and acceptance of your proposal. If your proposal is a renewal of an existing policy, it should also include any change in the facts previously advised to Underwriters.

DECLARATION

I / We declare that the statements and particulars given in this Proposal are correct and that no material fact has been omitted. I / We agree that this Proposal together with any other information supplied shall form the basis of the contract.

SIGNATURE:

POSITION:

DATE:





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