# PROFESSIONAL INDEMNITY – ESTATE AGENTS/SURVEYORS PROPOSAL

The completion of this form in no way binds the Proposer to purchase insurance, nor does it bind the Underwriters to give insurance. Any information given will only be passed to Underwriters for the purpose of quotation and will be treated as confidential.

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| --- | --- | --- | --- |
| **Proposer details** | | | |
| Proposer Name / Business Name:  (this is the ‘insured’ name to appear on the policy) |  | Contact name: |  |
| Address: |  | Postcode: |  |
| Telephone: |  | Mobile: |  |
| Email: |  | Establishment date: |  |

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| --- |
| **Full description of business activities** |
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| --- | --- | --- | --- |
| **Full Names of directors / partners / principals & consultants** | **Age** | **Qualifications** | **Date** |
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|  |  |  |  |
| **How many employees are there?** |  | | |

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| --- | --- | --- |
| **Gross fees received last financial year and estimate for forthcoming year:** | **Last year:** | **Forthcoming year:** |
| UK |  |  |
| USA or Canada |  |  |
| Elsewhere, excluding USA/Canada |  |  |
| Total | **0.00** | **0.00** |

**Are all overseas contracts subject to UK law?** YES  NO  N/A  If NO, please give details on a separate sheet

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Past 5 years’ largest contracts / If start-up, provide expected contract sizes and value** | | | | |
| Starting Date | Client | Description of Contract | Contract Value | Your Fees |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |

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| --- | --- | --- |
| **Please give the gross fees received in the past financial year, or estimates for new practice** | | |
|  | U.K. | Overseas |
| Estate Agency |  |  |
| Property Estate/Land Management  (excluding rent / lease renewals) |  |  |
| Rent Reviews / Lease Renewals |  |  |
| Quantity Surveying / Building Surveying |  |  |
| Project Management |  |  |
| Project Co-ordination |  |  |
| Structural Survey Valuations - Residential |  |  |
| Structural Survey Valuations - Commercial |  |  |
| Aerial / Marine Engineering Surveys |  |  |
| Mineral Surveys Valuations |  |  |
| Land Surveys Valuations |  |  |
| Architectural Work |  |  |
| Setting Out / Planning Supervision |  |  |
| Insurance or Building Society Agency |  |  |
| Investment Agency |  |  |
| Auctioneering / Livestock |  |  |
| Fine Arts / Antiques |  |  |
| Others - 'Description' - |  |  |
| TOTAL GROSS FEES | **0.00** | **0.00** |

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| **Largest and Average Commercial Survey Valuations in the last 5 years:** | | |
|  | Single | Portfolio |
| **Largest** | **£** | **£** |
| **Average** | **£** | **£** |
| **State number of Commercial Valuations:** |  | |
| **Percentage of fee income:** | **%** | |

|  |  |
| --- | --- |
| **Give number of Residential Survey Reports and Valuations in past year:** | |
| **1) Structural Surveys** |  |
| **2) House Buyers Reports** |  |
| **3) Lending Instituations Report** |  |
| **4) Major Structural Surveys** |  |
| **5) Others, (please specify)** |  |

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| --- | --- | --- |
| **Give largest and average job in last 5 years:** | Largest: | Average: |
| **Percentage of fee income:** | **%** |  |

**Please give details of Geographical areas in last 5 years and this coming year:**

**Do you comply with the RICS red and white book, where applicable:**  YES  NO

**a) Number of comparables made for valuations:**

**b) Is there a system for cross referring on valuations?:** YES  NO

**Do you re-inspect for re-valuations?:** YES  NO

**If NO, what is the maxium period before your re-inspect?:**

|  |  |
| --- | --- |
| **Have any claims for professional negligence, error or omission (successful or otherwise) been made against the Practice or its present and/or past Partners?** | YES  NO |
| **Are any of the Partners/Principals/Employees, AFTER ENQUIRY aware of any CIRCUMSTANCES which may give rise to a claim against this Practice or their predecessors in business or any of the present or former Partners/Principals:** | YES  NO |
| **Has any Insurer ever declined proposal or renewal for this Practice or any Partner/Principal, required an increased premium, imposed special terms or cancelled an insurance?** | YES  NO |
| If YES to any of the above, please give full details, including amounts, on a separate sheet | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **If you have previously been insured for professional indemnity, please give details** | | | | | | | | | |
| Name of Insurers: |  | | | | | Premium | |  | |
| Indemnity Limit: |  | Excess | |  | | Date of expiry of coverage | |  | |
| **What is the amount of indemnity you require?** | | | **£** | | **What excess are you prepared to pay?** | | | | **£** |
| **Would you also like a quotation for Public and Employers Liability Insurance?** | | | | | | | YES  NO | | |

**CVs of directors / partners / principals are always useful. Please send these, if possible, along with your completed proposal form**

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| **Other material information** |
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## Declaration

I/We declare that the statements and particulars in this proposal are true and that I/We have not mis-stated or suppressed any material facts. I/We agree that this proposal, together with any other information supplied by me/us shall form the basis of any Contract of Insurance effected thereon. I/We undertake to inform insurers of any material alteration to these facts occurring before completion of the Contract of Insurance. Returning this proposal does not bind the Proposer or Underwriter to complete this insurance but does authorise John Heath (UK) Ltd to seek terms on my/our behalf from Insurers including current Insurer's if any.

Signed: Date: