

## Professional Indemnity for Surveyors

### Proposer Details

1. a. Name(s) of Firm(s):

Name	Date commenced

Website address

1. b. Address(es) – all addresses must be shown together with the Principal in charge of each location:

Address	Principal in charge

1. c. Please give the following details for all Partners/Directors/Principals of the Firm(s):

Name	Qualifications	Date qualified	Age	How long as a Partner/Director/Principal

1. d. Is Cover required for any past Partner or Principal? yes  no

If 'yes' please provide full details:

Name	Qualification	How long with Proposer/s

1. e. Is Cover required for the previous business activities of any Principal? yes  no

Name of Principal									
Name of previous firm									
Period	From	To	From	To	From	To			
Fees for last 3 years	Y/E	/ /	£	Y/E	/ /	£	Y/E	/ /	£
	Y/E	/ /	£	Y/E	/ /	£	Y/E	/ /	£
	Y/E	/ /	£	Y/E	/ /	£	Y/E	/ /	£
Reason for leaving									
Position in firm									
Is there separate insurance covering the activities of this firm for the period stated above?									

2. Please state total number of: Principals/Directors  Qualified Staff  Other

3. a. Please provide a full description of all your activities:

Please provide a brochure if available.

3. b. Please state gross fees (£) in the columns provided for the last 5 complete financial years.

Year end	/	/	/	/	/
UK work					
USA/Canada					
Other overseas					
Total					
Financial year end date	<input type="text"/>				

4. a. Gross fees earned in the past 12 months from the following work:

	UK	Overseas
Quantity Surveying	£	£
Building Surveying	£	£
Residential Estate Agency	£	£
Commercial Estate Agency	£	£
Residential Property Management	£	£
Commercial Property Management	£	£
Rent Review/Lease Renewals	£	£
Land/Mineral/Hydro Graphic Surveying	£	£
Planning and Development Consultancy	£	£
Project Co-ordination	£	£
Project Management	£	£
Architectural Work	£	£
Residential S&V for lending	£	£
Commercial S&V for Lending	£	£
Condition Surveys	£	£
Residential Valuation Surveys non-Lending (probate etc)	£	£
Commercial Valuation Surveys non-Lending (probate etc)	£	£
Building Society Agency	£	£
General Insurance Business	£	£
Financial Services	£	£
Residential Auctioneering	£	£
Commercial Auctioneering	£	£
Environmental	£	£
Other	£	£
Total	£	£

4. b. Do you anticipate any major changes in these activities in the forthcoming 12 months?      yes       no   
 If 'yes' please give full details:


4. c. Where work is sub-contracted please provide the following:

What percentage of gross income/fees was paid to sub-contractors in the last financial year?  %

Are sub-contractors required to carry professional indemnity insurance?      yes       no

Do you get an indemnity from sub-contractors, in writing?      yes       no

If 'yes', to what limits?

4. d. Do you require any sub-contractor(s) to be indemnified under your insurance arrangements?      yes       no

If 'yes' please state:

Name	Qualifications	Fees paid (last Financial Year)

5. In respect of Question 4a. please provide the following additional details.

a. *Quantity Surveying:*

Please give details of the 5 largest contracts in the last 3 Years.

Client	Start date	Type of project	Total Contract Value	Fee	Approximate Completion Date

5. b. *Project Co-ordination:*

Please give details of the 5 largest contracts in the last 3 Years.

Client	Start date	Type of project	Total Contract Value	Fee	Approximate Completion Date

5. c. *Project Management:*

Please give details of the 5 largest contracts in the last 3 Years.

Client	Start date	Type of project	Total Contract Value	Fee	Approximate Completion Date

5. d. Residential Structural Surveys and Valuations:

i. Please provide the following for the last 3 years:

	Year		Year		Year				
	No.	Typical value of property	Maximum value of property	No.	Typical value of property	Maximum value of property	No.	Typical value of property	Maximum value of property
Full Structural Survey									
Partial reports – i.e. house-buyers reports									
Building Society reports for mortgages									
Written Valuations (other than mentioned above)									

ii. Have you undertaken any valuations for lending where the property value exceeds £2,500,000 in the last ten years?      yes       no

5. e. Commercial Structural Surveys and Valuations:

i. Please provide the following for the last 3 years:

	Year		Year		Year				
	No.	Typical value of property	Maximum value of property	No.	Typical value of property	Maximum value of property	No.	Typical value of property	Maximum value of property
Structural survey and/or valuation for lending purposes									
Structural Survey and/or valuation for other purposes									
Structural Survey only									

ii. Have you undertaken any valuations for lending where the property value exceeds £2,500,000 in the last ten years?      yes       no

6. There are activities in question 4a. where you have declared no fees for the current year. Have you at any time in the past 3 years provided these activities?      yes       no

If 'yes' please provide the following details:

	Years end		Years end		Years end	
Services provided		Fees received		Fees received		Fees received
	/	£	/	£	/	£
		£		£		£
		£		£		£

7. Do you use a standard form of contract, agreement or letter of appointment?      yes       no   
If 'yes' please attach a copy.

8. a. Is the Firm or any Partner or Principal a member of a Consortium or Joint Venture?      yes       no

If 'yes' please give the following details:

Name	Capacity	Details of job

8. b. Does the Firm or any Partner/Principal/Director act on behalf of, or undertake work for any Firm, Company or Organisation in which this Firm or any Partner/Principal/Director has a financial interest?      yes       no

8. c. Does any Partner/Principal/Director perform an executive role on behalf of any such Firm, Company or Organisation?      yes       no

If 'yes' to b. or c. please provide details:


9. a. Has the Firm(s) sustained any loss through the fraud or dishonesty of any person? yes  no

If 'yes' please provide details:

Three horizontal lines for providing details.

9. b. Is the Firm(s) aware of any allegation or occurrence of fraud or dishonesty at any time committed by any past or present Partner, Director or Employee? yes  no

If 'yes' please give details and state the precautions taken to prevent reoccurrence:

Three horizontal lines for providing details and precautions.

9. c. Does the firm(s) always require satisfactory references or only when engaging senior employees? Always  Senior appointments only

Nature of reference:

Written  Verbal

9. d. Is any employee allowed to sign cheques in his/her signature alone for values exceeding £25,000? yes  no

If 'yes' please provide details:

Three horizontal lines for providing details.

10. Has any insurer ever cancelled, declined, refused to renew or required an increased rate or special conditions in respect of your own or your predecessor(s)'s firm(s)'s insurance? yes  no

If 'yes' please give full details:

Three horizontal lines for providing full details.

11. Do you currently buy professional indemnity Insurance? yes  no

If 'yes' please provide the following details:

Renewal Date

Limit of Indemnity

Excess

Premium

Current Insurer

Five horizontal lines for providing details for items 11a-e.

12. Please specify:

a. The limit(s) of indemnity you require quotations for:

Five boxes, each starting with '£', for specifying indemnity limits.

b. Please state the excess you are prepared to carry:

Five boxes, each starting with '£', for specifying excess amounts.

13. Have any claims, whether successful or not been made against the Firm(s) or their predecessors in business or any of the present or former Partners, Principals or Directors?      yes       no
14. Is any Partner, Principal, Director or employee after inquiry, aware of any circumstance or occurrences which may give rise to a claim against the Firm(s) or their predecessors in business or any of the present or former Partners, Principals or Directors?      yes       no

If 'yes' to question 13 or 14 please provide full details:


**Declaration**

I/we declare that, after full enquiry, the contents of this proposal are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this proposal together with any other information supplied by me/us shall form the basis of any contract of insurance which may be effected. If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of Insurance, I/we undertake to inform Underwriters.

Signature of Principal

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Date

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