



PROPERTY PROFESSIONALS

Please complete this Proposal form in neat handwriting. The information provided will form the basis of your insurance quote and any subsequent cover that may be agreed. For additional information or information that you cannot fit into spaces provided please use a separate sheet.

1) Please provide the following details (including trading names) of the Proposer/s

Name	Date Commenced

Website Address:	
Email Address:	

2) ADDRESS(ES) of Proposer

All addresses must be shown together with the Principal responsible for the work at each office:

Address(es)	Principal in charge	Approximate % of total fees

3) Details of Principals

Name in full of all Principals	Qualifications	Date Qualified	How long as a Principal with Proposers

4) Is cover required for the previous business activities of any Principal?

YES			NO	
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If YES, please state

Name of Principal	N/a	
Name of Previous Firm		
Period	From: / / To: / /	From: / / To: / /
Fees for Last 3 Years	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?		

5) CURRENT INSURANCE

Name of current Insurers	
Name of Broker	
Renewal Date	
Limit of Indemnity	
Premium	
Excess	

6) Please state total number of:

Principals	
Qualified staff	
Others	
Please state name of any Trade Associations of which any Proposer is a member	

7) (a) Do you sub-contract work to any outside party?

YES			NO	
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If YES, please provide details:

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(b) Do you require any sub-contractors to be indemnified under your insurance arrangements?

YES			NO	
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If YES, please state:

Name	Qualifications	Fees paid (last financial year)

(c) Have there been any claims or circumstances against any sub-contractors to be indemnified under your insurance arrangements?

YES			NO	
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8) State for the Gross fees for :

	Estimated year	Current Year Estimate	Last Completed Year	Previous Year
Year end				
UK				
USA/ Canada				
Other				
Total Fees				
Average Fee				
Largest Fee				

(b) Split of Gross Fees in the last completed financial year:

Activity	%
Quantity Surveying	
Building Surveying	
Residential Estate Agency / Letting Agency	
Commercial Estate Agency	
Residential Property Management	
Commercial Property / Land Management	
Rent Reviews / Lease Renewals	
Setting out	
Land / Mineral / Hydro-graphic Surveying	
Planning & Development Consultancy (without detailed plans)	
Project Co-ordination	
Project Management	
Architectural Work	
Residential Surveys / Valuations for Lending purposes	
Other Residential Surveys / Valuations	
Commercial Surveys / Valuations for Lending purposes	
Other Commercial Surveys / Valuations	
Asbestos Surveys	
Building Society Agency	
General Insurance Business	
Financial Services	
Auctioneering	
Mortgage Broking	
Other	

9) All parts of this question relate to work completed in **the last 3 years**

Please note "own project value" refers to the total value of the proposer's proportion of the total project (not just the fee element)

(a) **Quantity Surveying Pre-Contract**

(i) Highest total single project value of an individual job:

£

(ii) Highest own single project value of an individual job:

£

(iii) Average own total single project value of jobs undertaken:

£

(b) Quantity Surveying Post-Contract

(i) Highest total single project value of an individual job:

£

(ii) Highest own single project value of an individual job:

£

(iii) Average own total single project value of jobs undertaken:

£

(c) Building Surveying

(i) Average total single project value of jobs undertaken:

£

(ii) Highest total single project value of an individual job:

£

(iii) Highest own single project value of an individual job:

£

(d) Commercial Estate Agency

(i) Average individual property value handled:

£

(ii) Highest individual property value handled:

£

(e) Commercial Property / Land Management (incl Rent Reviews etc)

Is there a working diary system which is checked regularly?

YES			NO	
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(f) Project Co-ordination (no responsibility for appointment of other consultants / contractors)

(i) Average total single project value of jobs undertaken:

(ii) Highest total single project value of an individual job:

(iii) Highest own single project value of an individual job:

(g) Project Management (with responsibility for appointment of other consultants/ contractors)

(i) Average total single project value of jobs undertaken:

(ii) Highest total single project value of an individual job:

(iii) Highest own single project value of an individual job:

(h) Architectural Work

(i) Please give details of the 3 largest project values where construction has commenced during the past 3 years:

Description	Total Own Contract Value	Total Contract Value	Extent of Services	Approximate Completion Date

(ii) Please give the average of total single project values of jobs undertaken:

(i) Residential Surveys / Valuations for Lending Purposes

(i) Please state approximately:

Average Annual Number of Reports	Highest Single Property Valuation	Average Single Property Valuation	Highest Portfolio Value	Average Portfolio Valuation
	£	£	£	£

(ii) Please identify your three largest clients:

Name	Annual Fee Income

(j) Commercial Surveys / Valuations for Lending Purposes

(i) Please state approximately:

Average Annual Number of Reports	Highest Single Property Valuation	Average Single Property Valuation	Highest Portfolio Valuation	Average Portfolio Valuation

(ii) Please identify your three largest clients:

Name	Annual Fee Income
	£
	£
	£

(K) Other Commercial Surveys / Valuations

Please state your three largest valuations:

Valuation	Client	Purpose
£		
£		
£		

(l) Financial Services

Do you undertake any Financial Services activities?

YES		NO	
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Are you tied (for the purposes of the Financial Services activities)?

YES		NO	
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If **INDEPENDENT**, how are you regulated?

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(m) Auctioneering

	Average Annual Fee	Max Value	Average Fee
Livestock & Dead-stock	£	£	£
Fine Arts or Antiques	£	£	£
Property or Land	£	£	£
Other (please give details)	£	£	£

(n) Other

Please give details:

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10) (a) Have you, or any other principals ever undertaken any valuations for lending purposes for any firm you are requiring cover for?

YES			NO	
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(b) Do you have any system for the cross-referencing of valuations for similar properties?

YES			NO	
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If **YES**, how long has this system been in operation?

Years

If **NO**, how would you support the accuracy of any valuation?

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(c) Have you at all times complied with the RICS Manual of Valuation Guidance Notes and the Statement of Asset Valuation Practice and Guidance Notes and when issued, the Appraisal and Valuation Manual?

YES			NO	
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If **NO**, please explain:

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d) Have you in the past 10 years undertaken any drive-by, kerb-side or desk-top valuations?

YES			NO	
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If **YES**, please give full details below:

Date	Location	Client	Purpose of Valuation	Valuation (£)

(e) Have you any intention of undertaking drive-by, kerb-side or desk-top valuations in the future

YES			NO	
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11) (a) If you have undertaken overseas work at any time in the past, please provide full details, including details of the country/countries involved:

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(b) Have you at any time accepted liability other than under the jurisdiction of the UK Courts?

YES			NO	
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If **YES**, to any of the above then please provide full details listing jurisdiction and amount of work involved.

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12) Do you knowingly undertake any work which involves contaminated or polluted land or property, or provide advice as to whether or not land or property might be contaminated or polluted?

YES	<input type="checkbox"/>		NO	<input type="checkbox"/>
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13) (a) Are satisfactory written references obtained from former employers for at least three years prior to the engagement of any employee?

YES	<input type="checkbox"/>		NO	<input type="checkbox"/>
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(b) Above what amount do cheques require more than one signature?

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(c) Are all cash books, receipts, counterfoils and bank statements checked independently of the person normally responsible by a Principal at least monthly?

YES	<input type="checkbox"/>		NO	<input type="checkbox"/>
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(d) Is there an annual audit by an independent accountant?

YES	<input type="checkbox"/>		NO	<input type="checkbox"/>
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14) (a) Are you or have you at any time been a member of a consortium or group practice or engaged with any other party in a Single Project Partnership?

YES	<input type="checkbox"/>		NO	<input type="checkbox"/>
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If **YES**, please give full details (including names of other parties)

(Special arrangements must be made to cover this type of work)

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(b) Does the Proposer/s or any Principal have any association with or financial interest in any other Practice, Company or Organisation for whom work is carried out and where cover is required?

YES				NO	
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If **YES**, please give full details of the nature of the work and association together with the name and business of the third party.

Fees from this source in last complete financial year: £
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15) (a) For what limits of indemnity are quotations required?

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16) (a) In respect of **ANY** of the risks to which this proposal relates, has any Claim been made (whether successful or not) against the Proposer or any past or present Principal?

YES				NO	
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(b) Has any loss been suffered by the Proposer, any Predecessor or any past or present Principal in respect of **ANY** of the risks to which this proposal relates?

YES				NO	
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If **YES** to (a) or (b) please give details:

Date of claim/ loss	Brief details of each claim /loss	Cost of claim/ loss	Estimated cost of claim/ loss outstanding

(c) What steps have been taken to prevent a recurrence?

17) Is any Principal, **AFTER FULL ENQUIRY**, aware of:

(a) Any circumstance which might give rise to a claim against the Proposer, any Predecessor or any past or present Principal?

YES			NO	
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(b) Any circumstance which might cause any loss to the Proposer, any Predecessor or past or present Principal?

YES			NO	
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(c) Any matter which might otherwise affect the consideration of this proposal for insurance?

YES			NO	
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If **YES** to any of the above, please give details:

18) Has any proposal for similar insurance made on the behalf of the Proposer or any of the present or past Partners, Directors or Principals, or on behalf of any Predecessor to the Proposer ever been declined or has any such insurance ever been cancelled or renewal been refused?

YES			NO	
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If **YES**, please give details:

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Please read this paragraph carefully before signing the declaration:

It is essential that you disclose to prospective Insurers all material facts and information (including all material circumstances) which might influence the judgement of an underwriter in deciding whether to accept the risk and on what terms. The obligation to provide this information continues up until the time there is a completed contract of insurance. Failure to do so entitles the Insurers, if they so wish, to avoid the contract of insurance from inception and so enables them to repudiate liability there under. If you have any doubt as to what constitutes a material fact or circumstance please do not hesitate to ask for advice.

DECLARATION

I/We declare that the information in the proposal form is true and that no Material Facts have been misstated or suppressed. The information provided in this proposal form made by or on behalf of the Proposer shall form the basis of the proposed policy. If there is any material change to the facts and information provided or any new material matter arises before completion of the insurance, I/We undertake to inform insurers. I/We consent to the information provided being used for the provision of insurance, which may involve sharing such information to third parties.

Signature of Principal/ Managing Partner or Director:	
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Date:	
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