

IT CONSULTANTS PROFESSIONAL INDEMNITY PROPOSAL FORM

Please read the following questions carefully and answer them all providing additional information where required. Should you require more space please provide answers on a separate sheet of paper.

Answer the question using **BLOCK CAPITALS** and tick boxes where appropriate.

1. PROPOSERS DETAILS

Full Name of Proposer

Address of Proposer

Contact details (tel, fax, e-mail, website)

Date Proposer established

Name of other parties to be included e.g. subsidiaries, partners, joint venture

Please state Names of directors / partners, Age, Qualifications, date qualified & how long they have been with the firm:

Please attach CV's

Number of employees split between the following:

Qualified:
Administrative:
Other (please specify):

Is the Proposer financially connected or associated with any other entity?

YES

NO

If YES please state details including nature of work & relevant dates:

During the past 10 years has the Proposer's name been changed, has any other business been purchased and/or has any takeover, merger or consolidation taken place?

YES

NO

If YES please state details including nature of work & relevant dates:

2. THE BUSINESS

Please provide details of fee income:

	Past Financial Year	Current Financial Year	Next Financial Year
Gibraltar & Spain			
Overseas			
USA			
TOTAL			

If fees/income are/is declared as derived from clients based Overseas please provide details including territories involved and income derived.

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Please allocate below, as a percentage to a total of 100%, the split in fees/income between activities for the last complete financial year:

	Gibraltar & Spain	Overseas	USA	Total
Hardware - sales of own brand				
Hardware - distribution of other brands				
Hardware - installation				
Hardware - maintenance				
Software product sales				
Software product sales - customisable software				
Software services - installation including configuration (No code)				
Software services - customisation (including code changes)				
Software services - developing bespoke applications				
Software services - maintenance				
Consultancy (please provide full details)				
Provision of contract staff				
Provision of outsourced services				
Provision of managed services				
Training				
Web design				
Domain name registration				
Web hosting				
Other - please specify				
TOTAL 100%				

If the Proposer undertakes or has undertaken software installation (including configuration and customisation services) please provide details of the length of time taken for a typical installation and the frequency of clients who do not have their own in house IT expertise.

Does the Proposer both specify the business requirements for the client and also implement the solution?

YES

NO

If the Proposer undertakes or has undertaken bespoke development services and/or consultancy services are you given the authority to manage projects on behalf of the client?

YES

NO

Is cover required for any other activity, now ceased, which is different to those declared in the table above?

YES

NO

If YES please provide details.

Is the Proposer aware of any change in activity/structure that will occur in the coming financial year?

YES

NO

If YES please provide details

What percentage of fees over the last 3 years have been paid to outside consultants?

When the Proposer engages outside consultants please provide details of the activities undertaken by the outside consultants.

Please list the Proposer's 3 largest contracts undertaken in the last 3 years.

Type of Service and Country	Fee	Contract Value	Date Commenced	Date Completed

Please list the Proposer's 3 largest contracts due to be undertaken in the next three years.

Type of Service and Country	Fee	Contract Value	Anticipated Date of Commencement	Anticipated Date of Completion

Is the Proposer a member of a consortium or has the Proposer entered into a joint venture agreement?

YES NO

If YES please provide details.

Is the Proposer admitted to any Association or accredited to any quality systems such as the ISO series?

YES NO

If YES please provide details.

What are the Proposer's procedures in operating a diary system?

If the Proposer is a sole practitioner, please provide details of arrangements to maintain service and standards in the event of sickness or holiday?

Does the Proposer have written procedures or checklists for the service performed?

YES

NO

If YES please provide details.

What records are kept by the Proposer of telephone conversations and attendance at meetings?

Does the Proposer subscribe to any form of Continuing Professional Development?

YES

NO

If YES please provide details.

What are the Proposer's procedures, such as letters of engagement, to ensure that a clients requirements are clearly identified and can be met?

How often does the Proposer undertake a review of working procedures?

What are the Proposer's procedures in reviewing the work undertaken by staff and partners?

Does the Proposer always obtain satisfactory written references when engaging employees?

YES

NO

If NO please provide details.

How does the Proposer appoint and manage any sub consultants?

Does the Proposer ensure that any outside consultants engaged carry their own Professional Indemnity Insurance?

YES

NO

3. INSURANCE COVERAGE

Does the Proposer currently have Professional Indemnity Insurance in force?

YES NO

If YES please provide the following information:

Name of Insurers:	
Indemnity Limit:	
Excess:	
Renewal Date:	
Number of years cover has been continuously in force:	

What is the amount of indemnity now required?

What is the amount of deductible now required?

Has any Proposal for similar insurance made on behalf of the Proposer's business, any predecessor of the business, or any principal, partner or director ever been declined or has such insurance ever been cancelled, renewal refused or any special terms imposed (other than general market increases)?

YES NO

If YES please provide details.

4. CLAIMS INFORMATION

After full enquiry has the Proposer sustained any loss through the fraud or dishonesty of any person?

YES NO

If YES please provide details.

After full enquiry is the Proposer aware of any fraud, dishonesty, bankruptcy or administration order applicable to THE Proposer and/or any past or present principal, partner, director or employee?

YES NO

If YES please provide details.

After full enquiry has any claim been made against the Proposer's business or against any principal, partner, director or employee whilst in this or any other business?

YES NO

If YES please provide details.

After full enquiry is the Proposer aware of any circumstance or incident which has or could result in any claim being made against the Proposer's business, or against any principal, partner, director or employee whilst in this or any other business?

YES NO

If YES please provide details.

5. DECLARATION

I/we declare and warrant that after enquiry all statements and particulars contained in this Proposal and addenda are true and that no information whatsoever has been withheld which might increase the risk of the Underwriters or influence the acceptance of this Proposal and should the above particulars alter in any way I/We will advise Underwriters as soon as is practicable.

I/We understand that failure to disclose any material facts which would influence the acceptance and assessment of the Proposal may result in the Underwriters refusing to provide indemnity or voiding the possibility in every respect.

I/We hereby agree and accept that this Declaration shall be the basis of the contract between both parties if entered into.

SIGNATURE

POSITION

NAME

DATE