

SURVEYORS 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.

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

YES

NO

If YES please give details

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

If fees are paid to outside consultants is cover required for the work undertaken by the outside consultants?

YES

NO

If YES please provide full details including nature of the work, projects undertaken and names of consultants?

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
Quantity Surveying (pre and post contract)				
Quantity Surveying (other)				
General Practice				
Estate/House Agency/Sales (residential)				
Estate/House Agency/Sales (commercial)				
Residential Survey/Valuation/Inspection - full structural				
Residential Survey/Valuation/Inspection - partial surveys				
Residential Survey/Valuation/Inspection - lending institution valuation				
Residential Survey/Valuation/Inspection - pre sale survey/home condition inspections				
Residential Survey/Valuation/Inspection - other valuations				
Commercial Survey/Valuation - survey				
Commercial Survey/Valuation - valuation				
Land/Agricultural Management				
Property/Estate Management/Rating/Rent Review (residential)				
Property/Estate Management/Rating/Rent Review (commercial)				
Land/Mineral/Hydrographic Surveying				
Auctioneering				
Building Surveying				
Architectural - design only				
Architectural - design and supervision				
Architectural - design supervision and project management				
Architectural - refurbishment (non structural)				
Architectural - design supervision and project co-ordination				
Project Management				
Project Co-ordination				
Employers Agent				
Planning and Development				
Planning Supervisor (CDM regulations)				
Building Society Agents				
Insurance Agents				
Loss Assessing/Loss Adjusting				
Expert Witness				
Other (specify)				
				100%

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

YES

NO

If YES please give details

Is the Proposer admitted to any Association or accredited to any quality systems such as the ISO9000?

YES

NO

If YES give details

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

How does the Proposer ensure that rent reviews are not missed?

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

YES

NO

If YES give 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 give 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 give details.

If any partner, principal, director or employee is allowed to sign cheques without a counter signature please provide details of the individuals, the cheque limit and the circumstances.

Are employees who receive cash/cheques in the course of their duties required to pay in daily?

YES

NO

If NO give details of the procedures implemented.

Does that Proposer ensure that sub consultants are engaged in a binding contract accepting responsibility for their own neglect, error or omission and does the Proposer ensure that all sub consultants carry Professional Indemnity Insurance?

YES

NO

3. INSURANCE COVER

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.

Has any fee earners in the Proposer's business ever faced criminal investigations or disciplinary proceedings by the Royal Institution of Chartered Surveyors or any other professional organisation?

YES

NO

Have you ever been late in paying or failed to pay either a professional indemnity premium or excess?

YES

NO

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 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