

Professions TechGuard Proposal Form

Proposer Details

Name of Firm(s)	
Principal Address of Company line one	
Principal Address of Company line two	
City and postcode	
Telephone number	
Fax number	
Website	
Date Firm(s) was Established	

If less than one year old please provide details of relevant experience of the directors on a separate sheet.

Professional Services

Please state in the columns provided the turnover (GBP) for the last five complete financial years (please insert month/year):

	/	/	/	/	/
Turnover	GBP	GBP	GBP	GBP	GBP
Please supply your estimated turnover for the forthcoming period of insurance, split as:		Ex	UK & ports to North Ame Rest of the W		

Please state in the columns provided the geographical percentage split of fee income:

1	:)	In the	United	Kingdom	and E	Iropo /	avaluding	(:::)	bolow	`
(1)	in the	United	Kingdom	and Et	liobe (excluding	(III)	Delow)

- (ii) In the USA and its territories and possessions or Canada
- (iii) In the UK or elsewhere (excluding (ii) above) for persons, companies, firms or organisations having an address in the USA and its territories and possessions or Canada

% of Fee Income for the last complete Financial Year	Estimated % of Fee Income for the next Financial Year

(iv) Rest of the World

If any income is derived from any office domiciled overseas for which coverage is required, please complete the income breakdown in the Premium Tax Supplementary Questionnaire attached, in order to calculate applicable taxes to apply.

Please provide an estimate of the percentage of total annual fees for the last complete financial year from the following categories

Distribution of Own Packaged Software % S			Strategic Planning		%
Distribution of Third Party Packaged % F		Procurement Consultancy		%	
Customisable Software		%	Fraining %		
Bespoke Software Development		%	Trouble Shooting		%
Systems Analysis		%	Project Management		%
Data Processing		%	Systems Audit		%
Facilities Management		%	Expert Witness		%
Sales / Supply of Hardware		%	Web-site Design		%
Hardware Maintenance / Installation		%	Internet Service Provision		%
Software Maintenance (including licen fees)	sing	%	Application Service Provision		%
Software Installation		%	IT Outsourcing		%
General Computer Advice		%	IT Security Consultancy		%
Is the work split above representative of the Firm(s) make- up over the previous three years?					
If 'No', please provide details					
Are any substantial changes in the percentage amounts shown above anticipated during the next 12 months?	ercentage amounts shown above nticipated during the next 12				
'Yes', please provide an xplanation					
Is the Firm(s) involved in the developm	nent or s	upply of any of th	ne following:		
Enterprise Resource Planning (ERP) Software					
Encryption Software			No		
Security Software / Public Key Infrastructure Yes			No		
Mission / Systems Critical Software Yes			No		
If 'Yes' to any of the above, please pro	ovide full	details on a sepa	arate sheet.		
Please provide details of the nature of end use:	software	e provided and its	S Software	End	Use
Does the Firm(s) have any contracts which emanate from the USA or Canada?	Yes		No		
If 'Yes', please provide details on your	headed	paper.			

Does the Firm manual work	n(s) undertake any in the USA?	Yes	No No		
Does the Firm sub-contracto	n(s) use independe rs?	ent 🗌 Yes	No No		
If 'Yes', pleas	e answer the follow	ving:			
Please state vothers?	what proportion of	the Firm's business inv	volves the subcontracting	g of work to	%
	n(s) insist that 's maintain their ow I Products Liability	vn 🗌 Yes	No No		
Please provid the forthcomin		a largest contracts eithe	er undertaken in the pas	t three years, or	for a new business / practice in
Name of Client	Business of Client	Nature o	of Contract	Total Value	Income to You
Risk Mana	gement				
Does the Firm standard writt conditions?	n(s) always use en contract	Yes	No		
lf 'No',					
What percent	age of contracts is	in the non-standard fo	rm?		%
What is the pr off of non-star	rocedure for the signation	gn-			L
In respect of a	all contracts the Fir	m(s) enters into, do th	ey always include:		
	of the scope of be provided?	Yes	No No		
(b) Limitation	of Liabilities?	Yes	No No		
	consequential and Loss Exclusion	Yes	No No		
(d) Force Maj	eure	Yes	No No		
(e) Guarantee	es	Yes	No		
Does the cust contract?	omer always sign	the 🗌 Yes	No No		
	made with the sent, and sign off b required?	y 🗌 Yes	No		

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Intellectual Property Rights

What percentage of products are:	1 year old or less	%
	Over 1 to 2 years old	%
	Over 2 to 5 years old	%
	Over 5 years old	%
Does the Firm(s) have a formal procedure to safeguard against infringing the intellectual property rights of others?	No	
If 'Yes', please provide full details		
Has the Firm(s) received any notice or warning, whether written or oral, with respect to any possible or actual intellectual property right claim against you?	No	
Fraud and Dishonesty		
Has the Firm(s) sustained any loss through the fraud or dishonesty of any person? 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?	No	
If 'Yes', to either please provide details		
Is any employee allowed to sign cheques on his/her signature alone for values exceeding £25,000? Yes	No	
If 'Yes', please give details on a separate sheet.		
Public and Products		
Does the firm perform activities at Third Party premises?	No	
If so, please advise type of activities		
Does the firm provide Performance Warranties or the like? Yes	No	
Does the firm perform hot work (eg velding)?	No	
Employers		
Please supply your estimated wageroll for the for	Clerical	£
of insurance gross of all National Insurance cont other remuneration between the following category	IT	£
	Other (please specify)	£

Previous coverage

Unless a renewal to AIG, please give details of previous Professional/Public/Products/Employers Liability Insurance carried during the past two years:

Class	Period	Insurer	Limit	Exc	ess	Premium
been declined o insurance ever l renewal refused	blic/Employers n behalf of the redecessors in present rs/principals ever					
imposed?		L Yes	L No			
Please specify t indemnity for wh		£	£		£	
are required	·	£	£			
Please specify the excess you would be prepared to carry		£	£		£	
would be prepai	eu lo carry	£	£			
Claims						
after inquiry awa ever having bee the Firm(s) or th	eir predecessors ny of the present	Yes	No No			
after inquiry awa circumstances of which may give against the Firm predecessors in of the present o	or occurrences rise to a claim or their business or any r former					
partners/directo	rs or principals?	L Yes	L No			

If you have answered YES to either question above full details of each matter must be advised before quotation can be considered. We must remind you that it is imperative to answer these questions correctly. FAILURE TO DO SO COULD WELL PREJUDICE YOUR RIGHTS, if subsequently a claim should arise.

In respect of Casualty, please provide a confirmed claims 5 year experience, including details of any individual losses or incidents with an incurred amount of £25,000 or above.

SIGNING THIS PROPOSAL DOES NOT BIND THE PROPOSER TO COMPLETE THIS INSURANCE

Declaration

I/We declare that the statements and particulars in this proposal are true and that no material facts have been misstated or suppressed after enquiry. I agree that this proposal, together with any other information supplied shall form the basis of any contract of insurance effected thereon. I undertake to inform the Insurers of any material alteration to those facts occurring before the completion of the contract of insurance

Signed	
Title (to be signed by Partner, Director or Principal or equivalent)	
Firm(s)	
Date	

AIG Europe Limited

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Premium Tax – Supplementary Questionnaire

Explanatory note: The regulations with respect to the payment of premium tax within the European Union have changed over recent years, in particular following the 'Kvaerner' European High Court Judgement in June 2001. Where it was previously the responsibility of the Insured to settle their overseas' premium tax liabilities locally with the relevant tax authorities, insurers are now increasingly being made strictly responsible for the collection of these tax amounts, along with the premium, and making the relevant payments on to those tax authorities. This is, of course, the same way the UK premium tax arrangements have always operated.

For every country (including outside the EU, as other countries are now adopting similar regulations) where you have a domiciled office, you have a potential liability for insurance tax payable to the local authority. Accordingly, in order for insurers to evaluate your tax liabilities and collect the correct amount for payment to the relevant tax authorities in overseas jurisdictions (as well as in the UK), can you please provide a breakdown of your income for the last completed financial year arising from all domestic and overseas activities below. If income is derived from the United States of America or Australia, please specify the state in which the office is domiciled.

Country	Income derived from each domiciled office
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%

Signed

Title

AIG Bring on tomorrow

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