



Surveyors  
Renewal Proposal

**1. NAME(S) OF FIRM**

(Please include any predecessors for whom cover is required):

**2. ADDRESSES OF THE PRINCIPAL OFFICE**

(Please list all other locations by Town, or County if overseas, and identify the supervising Partner/Director at each location. Please provide an appendix sheet if required):

**ALL OTHER ADDRESSES BY TOWN/COUNTRY**

|                    |  |
|--------------------|--|
| Principle Contact: |  |
| Telephone Number:  |  |
| Fax Number:        |  |
| E-Mail:            |  |
| Web-site Address:  |  |

**3. DATE OF COMMENCEMENT OF CURRENT BUSINESS**

**DATE OF COMMENCEMENT OF AND CESSATION OF FORMER BUSINESS**

(If applicable)

**REASON FOR CESSATION OF FORMER BUSINESS**

**4. FULL DESCRIPTION OF BUSINESS ACTIVITIES**

(Please attach brochure(s) if available):

**5. RECENT CHANGES**

During the last six years, has the name(s) of the Insured/Proposer changed or has any amalgamation or acquisition taken place, or have there been changes of Partners/Directors/Sole Practitioners (i.e. departed, retired or deceased etc...):

Yes      No

If “Yes”, please give details below:

**6. NEW ACTIVITIES**

Please provide details of major new activities being undertaken during the forthcoming financial year, i.e. new offices, new disciplines, territories etc...

Yes      No

If “Yes”, please give details below:

**7. GROSS FEE INCOME**

Please advise (for new insured(s)/proposer(s) start up’s, please estimate the expected fee income):

|  | Actual for Last Financial Year | Estimate for Current Financial Year | Estimate for Next Financial Year |
|--|--------------------------------|-------------------------------------|----------------------------------|
| UK   | £                              | £                                   | £                                |
| USA or Canada                                    | £                              | £                                   | £                                |
| Elsewhere excluding USA or Canada                | £                              | £                                   | £                                |
| Total in £                                       | £                              | £                                   | £                                |
| PLEASE STATE THE DATE OF YOUR FINANCIAL YEAR END |                                |                                     |                                  |

**7. QUOTATIONS REQUIRED** (If unsure, please contact to discuss or required 'Please obtain various')

|                    |   |   |   |
|--------------------|---|---|---|
| Limit of Indemnity | £ | £ | £ |
| Excess(es)         | £ | £ | £ |

**PLEASE NOTE, IT IS IMPERATIVE THAT SECTION (a), (b) AND (c) OF QUESTION 8 ARE ANSWERED CORRECTLY AS FAILURE TO DO SO COULD PREJUDICE YOUR RIGHTS IN THE EVENT OF A CLAIM ARISING IN THE FUTURE.**

**8. CLAIMS AND/OR CIRCUMSTANCES**

Where necessary, please provide details on an appendix sheet.

a) Claims

During the last ten years, have any claims, or circumstances which may have given rise to a claim, been made against the Firm(s) or predecessors in business or present or former Partners/Directors arising out of the activities of the Firm(s)?

Yes                  No

If “Yes”, please advise full details including amounts involved and settlement dates, where appropriate, below:

|                    |  |
|--------------------|--|
| Claims Paid        |  |
| Claims Outstanding |  |

b) Circumstances

Are any of the Partners/Directors, after enquiry, aware of any circumstances which may give rise to a claim against the Firm(s) or its predecessors in business or its/their present or former Partners/Directors?

Yes                  No

If “Yes”, please advise full details including amounts involved below:

c) Fidelity

- |      |  |     |    |
|------|--|-----|----|
| (i)  | Has the firm sustained any loss through fraud or dishonesty of any person?                               | Yes | No |
| (ii) | Does the firm know of any fraud or dishonesty of any present or former Partner/<br>Director or employee? | Yes | No |

If "Yes", please advise details and explain the precautions taken to prevent recurrence below:

**Important**

Your personal data may be processed and held by us in our capacity as data controllers in order for us to write and administer your policy and to assist in the claims handling process in accordance with applicable data protection laws. To read our data privacy policy in full and for more information about your data protection rights, please visit our website at: <https://www.barbicanprotect.com/cookies-privacy-policy/>.

**DECLARATION**

We hereby declare that to the best of our knowledge and belief the foregoing particulars and statements represent a fair presentation of the risk we are seeking to insure.

We hereby undertake to declare any material alterations or amendments to the foregoing particulars and statements which occur prior to the commencement of the contract of insurance.

Signed:

For and on behalf of:

Date:

## 1. DISCIPLINE PROFILE

Please advise approximate split of work during the last completed Financial Year within each of the disciplines below:

|   |  |   |
|---|--|---|
| (a) Quantity Surveying (Other than specific items listed below) |  | % |
| (b) General Practice (Other than specific items listed below)   |  | % |
| (c) Building Surveying (Other than specific items listed below) |  | % |
| (d) Estate/House Agency/Sales (i) Residential                   |  | % |
| (ii) Commercial   |  | % |
| (iii) Investment Agency   |  | % |
| (e) Auctioneering (i) Livestock                                 |  | % |
| (ii) Fine Art   |  | % |
| (iii) Plant & Machinery   |  | % |
| (iv) Other  |  | % |
| (f) Energy Performance Certificates                             |  | % |
| (g) Home Condition Reports                                      |  | % |
| (h) Principal Designer under CDM Regulations 2015               |  | % |
| (i) Survey/Valuation Reports (Residential Property)             |  | % |
| (i) Full Structural Surveys                                     |  | % |
| (ii) Partial Surveys (Homebuyers etc)                           |  | % |
| (iii) Lender Valuation Reports                                  |  | % |
| (iv) Probate/Matrimonial Valuations                             |  | % |
| (j) Survey/Valuation Reports (Commercial Property and Land)     |  |   |
| (i) For Lending Purposes  |  | % |
| (ii) For Purchasers   |  | % |
| (iii) For Accounting Purposes                                   |  | % |
| (iv) Other (please provide details)                             |  | % |
| (k) Survey/Valuation Reports (Agricultural Property)            |  |   |
| (i) For Lending Purposes  |  | % |
| (ii) Other (please provide details)                             |  | % |
| (l) Plant & Machinery Valuations                                |  | % |
| (m) Rent Reviews/Lease Renewals                                 |  | % |
| (n) Property/Estate/Land Management                             |  |   |
| (i) Residential   |  | % |
| (ii) Commercial   |  | % |
| (iii) Agricultural/Land   |  | % |

|  |      |
|--|------|
| (o) Residential Lettings only, i.e. with no property maintenance or rent collection responsibility   | %    |
| (p) Land/Mineral/Hydrographic Surveying  | %    |
| (q) Setting Out  | %    |
| (r) Project Management (Where the Firm is responsible for appointing other professionals and/or contractors in accordance with the contract) | %    |
| (s) Project Co-ordination (Where the Firm's principal makes the appointments, whether on the Firm's recommendation or not)                   | %    |
| (t) Architectural  | %    |
| (u) Town planning  | %    |
| (v) Planning & Development Consultancy   | %    |
| (w) Rating   |      |
| (x) General Insurance Agency & Building Society Agency   | %    |
| (y) Financial Services (completion of a separate Questionnaire may be required)  | %    |
| (z) Any Other Work – Please advise details:  | %    |
|  | 100% |

2. Under **Q1 DISCIPLINE PROFILE** above, for any activities where you have answered “Nil” please give details if you have undertaken such work in the last six years (or at all, if Financial Services)

3. Please provide details of the number of residential and commercial surveys, valuations and/or inspections over the years.

|   |  |  |  |
|---|--|--|--|
| Year  |  |  |  |
| No. of Residential Survey/Valuation/Inspections |  |  |  |
| No. of Commercial Survey/Valuation/Inspections  |  |  |  |

#### 4. SURVEY/INSPECTION/VALUATION REPORTS

a) Please advise the approximate geographical spread of valuations over the last three years:

|                                |   |                           |   |
|--------------------------------|---|---------------------------|---|
| London                         | % | South West England        | % |
| South East England (ex London) | % | Northern England/Scotland | % |
| Midlands                       | % | Others (Please specify):  | % |
| Wales                          | % |                           |   |
| East Anglia                    | % |                           |   |

b) Please advise your five largest surveys/valuations in the last five years (by individual property value):

| NAME | PROPERTY VALUE |
|------|----------------|
| 1)   | £              |
| 2)   | £              |
| 3)   | £              |
| 4)   | £              |
| 5)   | £              |

c) Is it your practice to always re-inspect for revaluations or assignments of existing Surveys?

Yes                      No

If "NO", please advise the maximum period for which you deem your valuation/survey to be current before such re-inspection is required:

d) What, if any, internal Quality Assurance Standards are in current practice to confirm/support the accuracy of any valuation/survey? Please advise nature of QA procedures and how long these have been used below:

e) Do you operate any form of database of comparable valuations of similar/identical properties? If so, please specify below:

#### 5. PROJECT MANAGEMENT / PROJECT CO-ORDINATION / ARCHITECTURAL DESIGN / QUANTITY SURVEYING

Please advise contract values of the five largest jobs in the last three years:

| Contract Value (£) | Type of service provided |
|--------------------|--------------------------|
|                    |                          |
|                    |                          |
|                    |                          |
|                    |                          |
|                    |                          |



**6. RENT REVIEWS**

Please advise the value of largest and average Rent Review in the last three years:

| Largest Rent Review Value (£) | Average Rent Review Value (£) |
|-------------------------------|-------------------------------|
|                               |                               |