

proposal form: property agents your business details

9. For property management please provide the following details:

a) Does the largest annual rent on any portfolio managed for a client exceed £1,000,000?

yes no

If yes, please complete the following:

Client	Number of properties	Commercial or residential?

10. Please provide details of all partners/principals

Name	Qualifications	Number of years experience

11. What is your total number of staff?

Partners/Directors _____

All Other _____

proposal form: property agents

your cover

1. Which covers would you like a quote for:

- Professional Indemnity
- Public Liability
- Employers Liability
- Legal Expenses
- Other (please specify)

2. Is cover required for any:

a) partners' previous business? yes no

If yes please give full detail below including name, reason for winding up/leaving and start/end date:

b) or any associated or subsidiary company? yes no

If yes, please include name, nature of association and details of business activity:

3. Do you undertake any property valuations for lending purposes? yes no

4. Do you ensure references are taken before shorthold tenancies are agreed? yes no

If no, please provide further information:

5. What limit of indemnity do you require?

- 250,000
- 500,000
- 1,000,000
- Other £ _____

proposal form: property agents your cover

6. Please provide your current insurance details:

Renewal date _____ / _____ / _____

Insurers _____

Premium _____

7. Have you, or any predecessor, or any current or previous partner or director ever had any professional indemnity claims made against you?

This includes any claim, prosecution, proceedings or investigations against you whether successful or not.

yes no

If yes, please provide full details:

Date claim made	Details paid	Outstanding amount	Amount paid	Date settled

8. After enquiry, are you aware of any circumstance or shortcoming in your work which may lead to a claim against you or any predecessor? yes no

If yes, please provide full details:

proposal form: property agents optional extras

LIABILITIES

PUBLIC / PRODUCTS LIABILITY

1. Do you or any of your staff engage in any manual work? yes no

If yes please provide brief details below:

2 Approximately what percentage of your work is undertaken away from your premises?

_____ %

3. Which liability do you require a quote for?

Public liability yes no

Products liability yes no

If yes, please provide details of product(s) supplied including source and use:

4. Please provide the Limit of Indemnity required:

£1,000,000 £5,000,000
 £2,000,000 Other £ _____

EMPLOYERS LIABILITY

1. Is this cover required? yes no

2. Please provide the Limit of Indemnity required:

£10,000,000
 Other £ _____

proposal form: property agents declaration

I confirm that the principals, partners or directors have never been:

- a) Convicted of any criminal offence (other than motoring)
- b) Investigated, reprimanded or disqualified by their professional body
- c) Subject to a County Court judgement
- d) Bankrupt, insolvent or disqualified from being a company director
- e) Refused insurance, non renewed or had their insurance cancelled
- f) Claimed against or had losses arising out of fraud or dishonesty

agree disagree

If you disagree, please provide full details:

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. Custodian Management Ltd may use this information for marketing (by post, telephone, email or fax) subject to compliance with the Data Protection Act 1998. Under this Act you have the right to amend or access information we hold on you or to withhold your details from being used for marketing. Please notify Custodian Management Ltd in writing if you wish to exercise any of these rights.

Signature of principal:



Date _____ / _____ / _____

Broker details:

Contact name _____

Contact number _____

Contact email _____