

Questionnaire to be completed where survey / valuation work is undertaken

If insufficient space then please continue on a separate sheet

Name of **Your** business:

1. Please state for the last three years and for 2007 and 2008

	Last year	2nd year back	3rd year back	2007	2008
Total gross fees from Residential surveying & valuing	£	£	£	£	£
Total gross fees from Commercial surveying & valuing	£	£	£	£	£
Total gross fees for all work	£	£	£	£	£
Average total number of surveys / valuations per fee earner per week					

2. Work Radius

Mile radius from office	% of Surveys / Valuations
0-25 mile radius of office	%
25-50 mile radius	%
50+ mile radius	%

3. Breakdown of work in last year

Category	Residential		Commercial	
	Fees	No. reports	Fees	No. reports
Valuation for lending other than described below	%		%	
RICS Homebuyer Report or equivalent – with lending valuation	%		%	
RICS Homebuyer Report or equivalent – with non-lending valuation	%		%	
RICS Homebuyer Report or equivalent – with no valuation	%		%	
Further Advance valuations – for existing lender	%		%	
Re-mortgage valuations – for existing lender	%		%	
Asset Valuations for balance sheet purposes or probate/divorce	%		%	
Condition Surveys – with lending valuation	%		%	
Condition Surveys – with non-lending valuation	%		%	
Condition Surveys – with no valuation	%		%	
For property investment funds	%		%	
Other (please provide details below)	%		%	

4. Please state for the last **seven** years:

Residential Buy to Let valuations - Names of lenders for whom most work undertaken:	
Valuations in relation to Developers (whether new build or conversions) - Names of lenders for whom most work undertaken:	
Valuations in relation to sub-prime products - Names of lenders for whom most work undertaken:	
Other Residential valuations - Names of lenders for whom most work undertaken:	
Other Commercial valuations - Names of lenders for whom most work undertaken:	

5. Please state for the last **seven** years:

Type of Valuation	Largest Valuation	Average Valuation
Residential	£	£
In relation to Developers	£	£
Other Commercial	£	£
Portfolio Valuations	£	£

6. Please state for the last **seven** years (please add additional information in the box below, if necessary):

Have You been removed from or refused admission to any lenders' panel?	YES / NO
Minimum number of comparables obtained to support Your valuations:	
How long You hold comparables on file:	
Sources of comparables:	e.g. estate agent sold values, estate agent for sale values, land registry values etc. (please identify database used)
Have You <i>always</i> reinspected properties when asked to refresh a valuation or in connection with re-mortgages or further advances?	YES / NO
Have You at all times complied with the RICS Valuation Standards (Red Book)?	YES / NO

Have <i>all</i> valuations and surveys been undertaken by a “RICS Registered Valuer” under the RICS Valuer Registration Scheme?	YES / NO
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7. Please state for the last **seven** years:

Have You undertaken any drive by, kerbside or desktop valuations?	YES / NO
If YES, in what circumstances have you undertaken this type of work?	
How did You control the increased risk?	

8. Please state for the last **seven** years:

Have You undertaken any surveys of care or nursing homes?	YES / NO
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9. Please state:

Have You at any time or do you intend to undertake any surveys or valuations other than of real estate and buildings?	YES / NO
Do You have any business relationship with or financial interest in any mortgage broker or solicitor?	YES / NO
Do You have a referral fee or shared commission arrangement with any other party?	YES / NO
Have You at any time carried out a valuation where You have a financial or family relationship with any party?	YES / NO
If YES to any of these questions, please provide full details:	

IMPORTANT:

In this questionnaire:

You / Your refers to all firms to be insured under this arrangement, including any predecessor or previous business for which cover is required

“Principal” means any Director, Partner, Member or Sole Trader.

DECLARATION

I/we declare that, after full enquiry, the contents of this questionnaire are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this questionnaire, together with any other information supplied by me/us, shall form the basis of any contract of insurance which may be effected.

If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of insurance, I/we undertake to inform Underwriters.

I/we hereby consent to any information I/we have provided being processed by you for the purposes of providing insurance and claims handling, which may necessitate sharing such information with third parties.

Under the Data Protection Act 1998 you have the right to access or amend the information we hold about you. If you would like to exercise either of these rights, please contact Manchester Underwriting Management Ltd.

Name of Principal signing this form:	
Signature of Principal :	
Date:	