

DESIGN & CONSTRUCT  
PROFESSIONAL INDEMNITY INSURANCE  
ONLINE PROPOSAL FORM  
(intended for clients with a turnover below £5,000,000)

euna



**Accountants**



**Architects**



**Engineers**



**Advertising & Media Consultants**



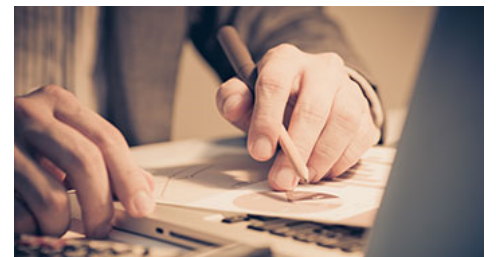
**Miscellaneous Professions**



**Technology Consultants**



**Surveyors**



**Management Liability**



**Recruitment Agencies**

**Please read the following information carefully before completing this proposal form. This should help present a clear and unambiguous picture and to ensure that underwriters understand the nature of your risk:**

- An Individual or a Partner, Principal or Director of the Firm/Company must complete the proposal form.
- Where a question is not applicable to your particular circumstances, please input N/A
- If there is insufficient space to answer questions please use an additional sheet and attach it to this proposal form
- Completing and signing this proposal form does not bind you, or insurers, to complete this contract of insurance
- If this proposal relates to a new business or venture, please complete the questions as far as possible, giving estimated income and information about your anticipated activities
- This short form is aimed at clients with less than £5,000,000 annual turnover. Please request a full proposal form if the fee income is likely to be in excess of that amount.

**1 Full Legal Trading Title**

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**2 Address (including postcode)**

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Post Code

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**3 Claims in the last 5 years?**  Yes  No

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**4 Number of years trading?**

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**5 Professional Indemnity Insurance Limit**

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If 'Other' please specify -

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**6 Fee income or turnover for the last completed year**

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**7 Number of Employees**

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**8 Do all partners/directors have at least five years' experience or the relevant professional qualifications?**  Yes  No

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\_\_\_\_\_  
Initial      Date

9 Do they currently have PI Insurance in place?  Yes  No

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10 Is the retroactive date known?  Yes  No

11 Does the client's current policy have the retroactive date of none or unlimited?  Yes  No

12 What retroactive date is required? (dd/mm/yyyy)

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13 Largest Contract Values?

Below £1m  Between £1-3m  Between £3-5m  Above £5m

If above £5m please specify Value(s)

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14 Do they undertake any work in the following areas: dams, harbours, jetties, offshore installations, tunnels (excluding drainage), bridges (other than small landscape or foot bridges), bulk handling plant, mines, nuclear, chemical, petro-chemical industries, oil, gas, power stations, asbestos removal or geo-tech environmental consultancy / engineering?  Yes  No

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15 Do they also do any work in the following areas: railways (trackside / safety critical), airports (airside), swimming pools 'clean rooms' or operating theatres??  Yes  No

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16 Do they do any work in the following industries - Sport, Amusement rides or Leisure (other than Pubs and Hotels)?  Yes  No

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17 Have they ever designed and/or had responsibility for Basement related work?  Yes  No

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18 Type of Basement work undertaken?  Basement work in respect of New Build projects only  
 Basement work has been undertaken under existing structures

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19 Is more than 15% of their work from any one of the following contract types? Cladding, Curtain Walling, Roofing, Glazing, Hospital &/or Foundation / Underpinning / Piling?  Yes  No

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\_\_\_\_\_  
Initial      Date

**20** Have they ever been involved in / responsible for the specification, selection, design, installation, certification of cladding / cladding systems or the project management of work that included cladding / cladding systems specified, designed, installed or certified by a third party?  Yes  No

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**21** Do they directly appoint professional sub-consultants (i.e. surveyors, engineers, architects etc)?  Yes  No

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**22** If yes, Do they use their best endeavours to ensure they carry Professional Indemnity Insurance?  Yes  No

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**23** Is any work undertaken outside of the United Kingdom and the Channel Islands and the Isle of Man?  Yes  No

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If Yes how much work? % and where?

**24** Please provide a Turnover split of all the Business Activities below.

Turnover where the Proposer designs and constructs from their own design and provides full technical supervision

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Fees where the Proposer provide design and technical supervision only, i.e. no construction is performed by the Proposer

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Turnover where the Proposer constructs from others' design performed on behalf of the Proposer, e.g. design is subcontracted to architects or consulting engineers (whether or not technical supervision is subcontracted)

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Turnover where the Proposer is responsible for construction but has no responsibility for design or technical supervision

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Total

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**25** Please provide a % split of all the Business Activities below.

Architecture / General Building %

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Building Services / Mech-Elec HVAC Services %

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Structural / Civil Engineering %

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Project Management %

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Foundation / Underpinning and/or Piling %

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Total: %

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Initial \_\_\_\_\_ Date \_\_\_\_\_

## Fair Presentation of Risk in Accordance with the Insurance Act 2015

The Partner, Principal or Director of the Firm/Company, must make a fair presentation of the risk to us – in accordance with Section 3 of the Insurance Act 2015. Such fair presentation must be reasonably clear and accessible, each representation of fact substantially correct, and every material representation of expectation or belief, made in good faith. In this regard, fair presentation covers ‘every material circumstance which the Partner, Principal or Director of the Firm/Company knows (or ought to know) generally, including any of the Senior Management. For the sake of completeness, this also includes any information held within the Firm / Company’s organisation. If any subsidiaries, affiliates or other parties are to be insured under this application, we expect that the relevant information has been sourced and provided herein.

For the purposes of this Fair Presentation the Senior Management means, in accordance with the Insurance Act 2015: those individuals that play significant roles in the making of decisions about how the Insured’s activities / services / clients are to be managed. Under Section 4 of the Insurance Act 2015 an Insured must disclose all material circumstances known to its ‘Senior Management’ and those persons responsible for the Insured’s insurances.

I / we the undersigned, agree that this submission together with any additional detail supplied, represents a fair presentation of the risk known to the Senior Management of the Firm/Company noted below.

|            |  |          |  |
|------------|--|----------|--|
| Signed     |  | Date     |  |
| Print Name |  | Position |  |
| Company    |  |          |  |

### **Short Form Privacy Notice**

In order for us and the insurers to provide you with your insurance cover, we collect and process information about you. This information includes details such as your name, address and contact details and any other information that we collect about you in connection with the insurance cover from which you benefit. This information may include more sensitive details such as information about your health or any criminal convictions you may have.

In certain circumstances, we may need your consent to process certain categories of information about you, including any sensitive information (health information or information relating to any criminal convictions). Where your consent is required, unless another ground applies, your consent to this processing is necessary for us to provide our services and we will ask you for your consent separately. You may withdraw your consent at any time. However, should you exercise this right, we may not be able to fulfil the insurance services requested by you, your policy may terminate, or you may be unable to make a claim.

The way insurance works means we may need to disclose your personal information to third parties in the insurance market for example, insurers or other insurance market participants or credit reference agencies and to third parties including loss adjusters, claims handlers and solicitors.

More information about our use of personal data is set out in our Privacy Notice on our website, [www.euna.com](http://www.euna.com). We recommend that you review this notice.

# euna

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Euna Underwriting Limited are an  
Appointed Representative of  
ES Risks Limited  
FRN 565023

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