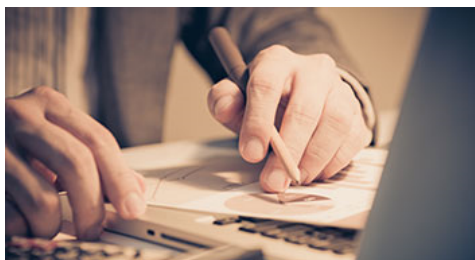


MISCELLANEOUS PROFESSIONS  
PROFESSIONAL INDEMNITY INSURANCE  
ONLINE PROPOSAL FORM  
(intended for clients with a fee income below £500,000)

euna



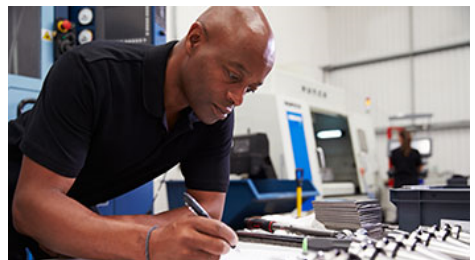
**Accountants**



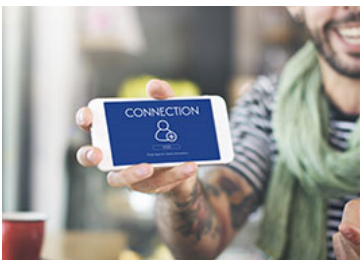
**Architects**



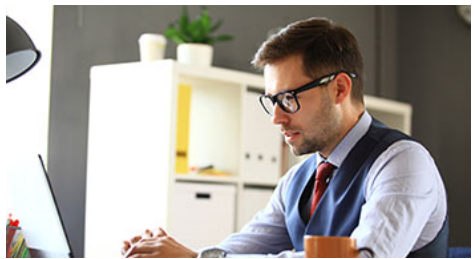
**Design & Construct**



**Engineers**



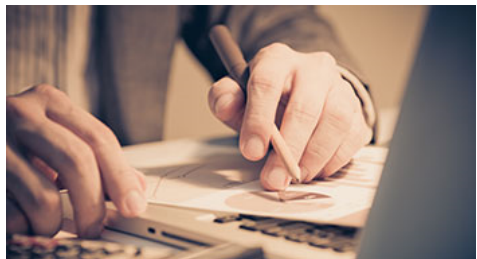
**Advertising & Media Consu**



**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 £500,000 annual fee income. 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 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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**6 Fee income or turnover for the last completed year**

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**7 Number of Employees**

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**8 Do they currently have PI Insurance in place?**  Yes  No

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**9 Is the retroactive date known?**  Yes  No

\_\_\_\_\_  
Initial

\_\_\_\_\_  
Date

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

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11 What retroactive date is required? (dd/mmm/yyyy)

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12 Trade Occupation

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

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14 Are they responsible for delivering any projects costing more than £2m?  Yes  No

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15 Do they undertake any work or provide advice or services in relation to the following:  
- valuation, accountancy, auditing, tax, mortgages, loans, insurance, investments or due diligence work  
- insolvency, liquidation, receivership, mergers, acquisitions, business turnaround  
- contaminated land, asbestos, renewable energy or pollution  
- medical advice / diagnosis/treatment  
- structural designs or project management of construction projects  Yes  No

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16 Are they responsible for any legal matters other than general employment, immigration or health & safety law advice or serving court papers?  Yes  No

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17 Do they undertake work in the following sectors?:  
nuclear / railway / automotive / pharmaceutical / aerospace / aviation / defence  
/ government / financial institutions including internet banking  Yes  No

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18 Do they always use a written contract or terms and conditions with every client?  Yes  No

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

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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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