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







Accountants



**Architects** 



**Design & Construct** 



**Engineers** 



**Advertising & Media Consultants** 



**Miscellaneous Professions** 







**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:

- o An Individual or a Partner, Principal or Director of the Firm/Company must complete the proposal form.
- o Where a question is not applicable to your particular circumstances, please input N/A
- o 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
- o 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
- o 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			
2	Address (including Post Code)			
3	Claims in the last 5 years?	☐ Yes ☐ No		
4	Number of years trading?			
5	Professional Indemnity Insurance Limit  If 'Other' please specify -			
6	Fee income or turnover for the last completed year			
7	Number of Employees			
8	Do they currently have PI Insurance in place?	☐ Yes ☐ No		
9		☐ Yes ☐ No		
	Is the retroactive date known?	☐ Yes ☐ No		
	Is the retroactive date known?	☐ Yes ☐ No		

10	Does the client's current policy have the retroactive date of none or unlimited?	☐ Yes ☐ No	
11	What retroactive date is required? (dd/mm/yyyy)		
2	Does the proposer have chartered status by RICS?	☐ Yes ☐ No	
3	If no, Do all partners/directors have at least five years' experience or the relevant professional	ıl qualifications? ☐ Yes ☐ No	
4 Largest Contract Value undertaken in respect of Architectural Design / Quantity Surveying / Project Management / Project Co-ordination?			
	☐ Not Applicable☐ Below £5m	☐ Above £5m	
	Do they do any work in the following areas: dams, harbours, jetties, offshore installations, turdrainage), bridges (other than small landscape or foot bridges), mines, nuclear, chemical, pet industries, oil, gas, railways (trackside / safety critical) and airports (airside), swimming pools rides / parks, golf courses or asbestos surveys and/or removal?	ro-chemical	
6	Have they done any structural surveying work in the past 5 years or do they intend to do any	in the future?	
		☐ Yes ☐ No	
	Have they ever done any valuation (including pre-purchase surveys, homebuyer reports and valuation work) in the past or do they intend to do any in the future?	valuation for  ☐ Yes ☐ No	
	Have they ever been involved in / responsible for the specification, selection, design, installation of cladding / cladding systems or the project management of work that included cladding / classpecified, designed, installed or certified by a third party?		
	Initial Date		

H&S matters?	☐ Yes	any
Do they directly appoint professional sub-consultants (i.e. surveyors, engineers, architects etc	)? Yes	
If yes, Do they use their best endeavours to ensure they carry Professional Indemnity Insuran	ce?	
Is any work undertaken outside of the United Kingdom and the Channel Islands and the Isle of	f Man?	
Please provide a % split of all the Business Activities below.		
Auctioneering (excluding Fine Art)		
Council tax rating		
CDM Planning & Supervision		
Expert witness		
Residential estate agency		
Stocktaking		
Town Planning		
Employers Agent		
Project Coordination		
Building Surveying		
Commercial estate agency		
Land surveying (excluding setting out)		
Residential letting agency		
Residential property management Outside city centres		
Residential property management In city centres		
Pure Quantity Surveying		
Residential rent reviews outside city centres		
Residential rent reviews in city centres		
Clerk of works		

Page 4 of 7

Initial Date

Leashold enfranchisement	
Commercial property management in city centres	%
Commercial property management outside city centres	%
Commercial rent reviews outside city centres	%
Commercial rent reviews in city centres	%
Project management	%
Architectural work	%
Asset valuations for balance sheet purposes	%
Probate/matrimonial and divorce valuations	%
Property acquisition / investment / development agency	%
Structural Surveys (excluding home buyer and pre-purchase)	%
Setting Out	%
Agrictultural work (single farm payments)	%
Home buyer reports / pre-purchase surveys	%
Valuation for lending surveys	%
Other (please specify)	%
Total	%

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 representation 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. We recommend that you review this notice.



## **Euna Underwriting Limited**

America House, 2 America Square London EC3N 2LU

Phone: +44 203 1264896 Email: info@euna.com

Euna.com

Authorised and Regulated by the Financial Conduct Authority FRN 655006

Registered in England and Wales Number 09154730 at 5th Floor Minories House 2–5 Minories, London EC3N 1BJ

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

1406 September 18 Version 1