

SURVEYORS & PROPERTY PROFESSIONALS PROFESSIONAL INDEMNITY PROPOSAL FORM

The completion of this form in no way binds the Proposer to purchase insurance, nor does it bind Underwriters to give insurance. Any information given will only be passed to Underwriters for the purpose of quotation and will be treated as confidential.

1) COMPANY NAME / TRADING NAME(S) INCLUDING PREVIOUS TRADING STYLES:				
2) PREVIOUS TRADING NAMES TO BE INCLUDED IN COVER:				
3) FIRMS PRIMARY ADDRESS AND EIRCODE:				
4) WEBSITE ADDRESS			5) DATE 1ST ESTABLISHED:	
6) FIRMS BUSINESS DESCRIPTION:				
7) IS THE FIRM A RICS REGULATED FIRM?				YES
8) DETAILS OF MAIN PRINCIPALS, PARTNERS OR DIRECTORS OF THE FIRM: (PLEASE ATTACH CV'S IF AVAILABLE)				NO
FULL NAME	D.O.B	QUALIFICATIONS		
9)	IRELAND	USA/CANADA	OTHER	TOTAL
Total Gross Fees in last financial Year ending:/...../.....	€	€	€	€
Total Gross Fees for the current year:	€	€	€	€
Total Gross Fees in previous financial year :	€	€	€	€
Estimated Gross Fees for next financial year:	€	€	€	€
Largest fee earned from any client over the last 3 years?			€	

Average fee per client over the last 12 months?	€
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10) Does The Firm currently hold Professional Indemnity Insurance?		YES	NO
Current Insurers			
Premium			
Excess			
Renewal Date			
Retroactive Date			
11) What Limit of Indemnity is required?			
12) Full Description of Activities, with percentage breakdown (estimated if no historical data):			
Agricultural Management	%	Letting Agents Commercial	%
Approved Inspectors	%	Letting Agents Residential	%
Architecture	%	Maintenance, Snagging and Condition Surveys	%
Asbestos Surveys	%	Other Building Surveys	%
Auctioneering & Valuations Arts	%	Other Valuations	%
Auctioneering Other	%	Party Wall Surveying	%
Auctioneering Property	%	Pre-acquisition Building Surveys / Reports	%
CDM / Principal Designer	%	Project Co-ordination	%
Clerk Of Work	%	Project Management	%
Commercial Valuation for Lending	%	Property Management Commercial	%
Commercial Valuation for Non-Lending	%	Property Management Residential	%
Contract Administration	%	Property Finance & Funding Advice	%
Dilapidations	%	Property Investment Advice /Fund Management	%
Employers Agents	%	Quantity Surveying - General	%
Energy & Hips Reports	%	Quantity Surveying – Pre Contract	%
Estate Agents Commercial	%	Quantity Surveying – Post Contract	%
Estate Agents Residential	%	Refurbishment	%
Expert Witness	%	Rent & Rate Reviews Commercial	%
Facilities Management	%	Rent & Rate Reviews Residential	%
Feasibility Studies	%	Residential Valuation for Lenders	%
General Practice / Advice	%	Residential Valuations for Non-Lenders	%
Insurance / Building Society Commissions	%	RICS Home Buyer Report – Lenders	%
Investment Advice	%	RICS Home Buyer Report - Private	%
Investment Agency	%	Setting Out	%

Land Management	%	Town / Rural Planning / Planning Application	%		
Land Surveying	%	Other (Please specify)	%		
13) DETAILS OF THE 5 LARGEST CONTRACTS IN THE LAST 5 YEARS (GIVE DETAILS OF CURRENT PROJECTS IF NEW BUSINESS):					
Dates	Client	Description	Total Contract Value	Own Contract Value	Fee
14) Have you undertaken any surveys or valuations in the last 6 years?				YES	NO
If YES, please provide a fully completed S&V Questionnaire					
15) Have you been involved with or do you expect to be involved in any projects with basements?				YES	NO
16) Have you been involved with or do you expect to be involved in any swimming pool projects?				YES	NO
17) Have you been involved or do you expect to be involved in any projects where any type of cladding, façade system or curtain walling has been used?				YES	NO
If you answer "YES" to any of the above (15-17), please provide a fully completed Combined Construction Questionnaire					
18) Do you undertake external wall fire reviews / ews-1 forms?				YES	NO
19) Have you been involved with or do you expect to be involved in any rapid build schools projects for the department of education or rapid build housing schemes for Dublin City Council?				YES	NO
20) Have you had any involvement with any of the following: Harbours / Jetties / Sea Defences/ Offshore Installations / Marine/ Bridges/ Tunnels Mines/ Chemical / Oil / Nuclear / Rail / Airports				YES	NO
21) Do you engage in, or are you responsible for the manufacture or fabrication of any manufacturing, construction, erection or installation?				YES	NO
22) Do you work from offices other than your Irish offices?				YES	NO
23) Do you enter into any contracts where the jurisdiction or applicable law is other than Ireland?				YES	NO
24) Does any one client generate more than 20% of your fee income/turnover				YES	NO
25) Do you work to a professional code of conduct?				YES	NO

26) Are any major changes anticipated in the work undertaken over the next 12 months?	YES	NO
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If Yes to any of the above (18-26), please provide full details at the end of the form

27) RISK MANAGEMENT

Please confirm that

(a) work undertaken by professional / technical staff is regularly reviewed by a principal, partner, director or qualified manager?	TRUE	FALSE
(b) written procedures or checklists are used for the professional / technical service provided?	TRUE	FALSE
(c) any consultants for which you are or have been responsible for are required to have Professional Indemnity Insurance for a limit of at least €1,000,000 or equal to your own limit if lower?	TRUE	FALSE
(d) contracts are evidenced in writing, specify the work to be undertaken and the extent of your responsibility?	TRUE	FALSE
(e) changes in specification during the course of a contract are evidenced in writing?	TRUE	FALSE
(f) satisfactory written references are always obtained for new employees?	TRUE	FALSE
(g) systems are in place for ensuring that time limits and critical dates are met?	TRUE	FALSE

If you answer 'False' to any of the questions above please provide details at the end of the form

28) CLAIMS AND OTHER CIRCUMSTANCE STATEMENTS

(a) No claims for professional negligence, error or omissions or the like have ever been made against The Firm or any predecessor(s) in business or against any Partners/Directors/Principals either directly or in respect of any Company of which they were a Partner/Director/Principal of.	TRUE	FALSE
(b) After enquiry within The Firm the Proposer is not aware of any circumstances which have occurred which may give rise to a claim.	TRUE	FALSE
(c) The Firm or any Partners/Directors/Principal has not had any Insurers decline to offer PI renewal terms, nor has had their PI policy cancelled or voided, or had any special premium increase or special terms being imposed due to a material fact.	TRUE	FALSE
(d) The Firm or any Partners/Directors/Principal do not act, or have not acted, in any capacity other than those declared	TRUE	FALSE
(e) The Firm or any Partners/Directors/Principal have not ever been the subject of investigations or disciplinary proceedings by any Regulatory Body or the Health & Safety Authority?	TRUE	FALSE
(f) The Firm or any Partners/Directors/Principal do not undertake work for any partnership, company or organisation in which they are in a position to exercise a controlling interest in such a partnership, company, organisation.	TRUE	FALSE

If you answer 'False', to any of the questions above please provide details on the final page of this proposal form.

29) MATERIAL INFORMATION

You must search for all material information and disclose it to us without misrepresentation. Material information is anything which might reasonably influence our decision to offer you insurance or the terms (including the premium) on which any offer is made. It includes facts, circumstances, allegations and events. Material information includes special or unusual facts concerning you or your business, any particular concerns you may have which have led you to seek or increase your insurance cover and any other facts relevant to the risk taken by us. You should assume that all information specifically sought by us is material, whether in this Statement of Fact or otherwise.

Please check carefully all the information and advise your insurance adviser if any corrections or additions are required as soon as reasonably practicable.

30) DECLARATION

I/we declare that I/we have made a fair presentation of the risk, by disclosing all material matters which I/we know or ought to know or, failing that, by giving the Insurer sufficient information to put a prudent insurer on notice that it needs to make further enquiries in order to reveal material circumstances.

Signed:

Dated:

ANY ADDITIONAL INFORMATION (PLEASE CONTINUE ON A SEPARATE SHEET IF REQUIRED):