

PROPOSAL FORM FOR RELOCATION PROFESSIONALS

Proposer

1. Name

Business Name.....

Address.....

.....

Postcode..... Tel No.....

2. When was your business established?

3. Are you a member of the ARP? YES NO

If YES, please state type of membership:

Full

Associate

Affiliate

4. Would you consider yourself a:

Homesearch Agent Relocation Management Company Commercial Relocation Specialist

5. Please list below your details and those of any partners or directors of the companies listed above:

Name	Qualifications	Years of Experience

Please provide a copy of a CV for each of the principals of the company with this proposal.

If this is a new start-up, please outline the relevant experience and knowledge that you have of the area in which you intend to operate:

6. Please provide the total number of:

Professionally qualified technical staff (including years of experience)	
Other technical staff	
Administrative and secretarial staff	

7. Do you use independent sub-contractors? YES NO

If YES:

a) What approximate percentage of your turnover is paid to sub-contractors? %

b) What work do you sub-contract?

c) Do you ensure they have their own P.I. insurance? YES NO

8. We need to know your turnover including fee income and where it comes from. Please fill out the table below:

	Past Year ending / /	Current Year	Estimate for coming Year
Total Turnover including Fee Income	£	£	£

Estimated percentage split of your turnover including fee income for:

Work carried out in UK except Scotland for UK clients	%	%	%
Work carried out in UK except Scotland for Overseas clients	%	%	%
Work carried out in Scotland for UK clients	%	%	%
Work carried out in Scotland for Overseas clients	%	%	%

Do you carry out any overseas work? YES NO

N.B. This insurance is not suitable for work carried out overseas.

9. We need to know your annual wage roll. Please fill out the table below:

Current Year	Estimate Next Year
£	£

10. Do you have standard written contract you always use with clients? YES NO

If NO, please explain how you usually contract:

Please supply a copy of your standard contract terms and conditions with this proposal.

11. Please provide details of your contracts:

	Property purchase	Rental search
Largest fee for	£	£
Average fee for	£	£
Retainer charged for	£	£

12. Your turnover including fee income must be separated approximately into the activities listed below so that we can understand what you are doing and because we only cover you for the work which you declare:

a) Purchase assignments	£
b) Rental assignments	£
c) Work for individuals	%
d) Work for companies	%
When working for a company do you assist in the relocation of:	
(i) Individuals	%
(ii) Groups	%
(iii) Whole company (site relocation)	%

13. Do you ever provide introductions between clients and solicitors or surveyors or financial advisors etc? YES NO

If YES:

Do you always provide more than one option? YES NO

Do you ensure that these people are professionally qualified and experienced? YES NO

If NO, please explain your reasons for not doing so:

Do you charge a referral fee for these introductions? YES NO

Is this fee paid by the client or the person the client is referred to?

Do you always make it clear that it is an introduction only and ensure that the client contacts direct with them? YES NO

If NO, Please explain how you deal on your clients behalf directly:

14. Have/would you ever purchase a property on behalf of a client without the client viewing it first? YES NO

If YES, please provide full details:

15. Do you ever bid for a property on behalf of a client? YES NO

If YES, do you *always* agree an *exact* upper monetary limit? YES NO

If NO, please provide full details:

16. Do you assist clients with understanding survey reports? YES NO

If YES, is this a legal interpretation of the report or general comments?
Please try to give as much information as possible:

17. Do you comment on house valuations or rent levels? YES NO

If this is specific advice, please provide details below:

18. a) Do you review/plan the relocation policies of companies? YES NO

b) Do you review/design the relocation policies of companies? YES NO

If YES, please provide full details:

19. Do you currently have Professional Indemnity insurance?

YES

NO

If **YES**, what is the renewal date?

If you currently have Professional Indemnity insurance with someone other than Hiscox then please answer the following:

Name of insurer:

Limit of indemnity:

Excess:

Premium:

20. a) Has any claim been brought against you arising out of the performance of your business activities or has anyone threatened to bring such a claim?

YES

NO

If **YES**, please provide full details:

b) Are you aware of any circumstance which may give rise to a claim against you in the future?

YES

NO

This includes criticism of your work even if you regard it as unjustifiable.

If **YES**, please provide full details:

c) Have you suffered any loss from the dishonesty or malice of any employee, subcontractor or self-employed freelancer?

YES

NO

Do you currently have any grounds for suspecting that such a person has acted dishonestly or maliciously when working for you or on your behalf?

YES

NO

If **YES** to either, please provide full details:

Material Information

Please provide us with details of any other information which may be relevant to our consideration of your proposal for insurance. If you have any doubt over whether something is relevant, please let us have details:

Declaration

1. I/We declare that (a) this proposal form has been completed after proper enquiry; (b) its contents are true and accurate and (c) all facts and matters which may be relevant to the consideration of our proposal for insurance have been disclosed.
2. I/We undertake to inform you before any contract of insurance is concluded, if there is any material change to the information already provided or any new fact or matter arises which may be relevant to the consideration of our proposal for insurance.
3. I/We agree that this proposal form and all other written information which is provided are incorporated into and form the basis of any contract of insurance.

Signature of
Principal/Partner/Director

Date

A copy of this proposal should be retained for your records.