

# Proposal Form for: SURVEYORS, VALUERS & ESTATE AGENTS

1)

Full title of Company/Firm and subsidiary Companies/Firms and former Companies/Firms for whom cover is required under this policy	
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2)

Address		
Postcode		
Tel No		
Fax No		
Email		
Website		

3)

Date Established	
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4)

Profession/Business	
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5) Please give details (including Sole Practitioners) of all Partner(s) / Director(s)

Full Name	Age	Qualifications	Date Qualified	No. of years in this capacity with Proposer(s)

6) Please State number of staff

Professionally Qualified	Unqualified Assistants	All Others

7)

Is cover required for any Partner or Director in respect of his/her liability arising from any previous business?	
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If 'YES' please advise

For which Partners	Title and nature of previous Business	Date Partner left Business	Limit of Indemnity required if less than stated in Q29

8) Is cover required for work sub-contracted? If 'YES' please advise

Name	Qualifications	Fees Paid (last financial year)	Does Sub-consultant have own cover?



- 11) Where you have declared £Nil fees in answer to any parts of question 10 has your Company/Firm worked in any of these areas in the last five years? YES/NO

If 'YES' please give full details of the work undertaken and the fees earned	
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- 12) (a) Residential-Structural surveys Reports and Valuations – Please supply number undertaken in the past year of:

(i) structural surveys		(iv) major structural survey reports	
(ii) partial reports /inspections (ie homebuyers)		(v) other (please specify below)	
(iii) building society/lending institution reports			

- (b) Please specify in respect of Residential Surveys Reports and Valuations in the last 5 years?

(i) Average Property Value	£	(ii) Largest Property Value	£
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- (c) State gross fees received in past five years in respect of Residential Survey Reports and Valuations:

20-	£	20-	£	20-	£	20-	£	20-	£
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- 13) (a) Commercial Structural Survey Reports and Valuations-Specify the amount of the largest and average valuation in the last 5 years for:

		Largest	Average		Largest	Average
(i) single property:	UK	£	£	Elsewhere	£	£
(ii) portfolio:	UK	£	£	Elsewhere	£	£

- (b) State gross fees received in past five years in respect of Commercial Survey Reports and Valuations

20-	£	20-	£	20-	£	20-	£	20-	£
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(c) State the number of Commercial Valuations undertaken in the past year	
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- 14) (a) Please state the approximate geographical spread (expressed as a percentage of the total number carried out) of your Structural Survey Reports and Valuations in the last five years, or, if previously none please show the anticipated geographical spread for the forthcoming twelve months:

London		East Anglia	
South East England		Midlands	
South West England		Scotland	
North East England		Wales	
North West England		N Ireland	
		Elsewhere (please specify)	

- 15)

(a) Has any Director, Partner or Employee been subject to any disciplinary proceedings by the RICS or ISVA?	
If 'YES' please provide details:	

(a) Has any Director, Partner or Employee been removed from any panel of surveyors?	
If 'YES' please provide details:	

16) **Architectural/Quantity Surveyors/Project Management/Project Co-ordination**

State the three largest contracts where construction has commenced during the past five years:

Starting Date and approximate completion date	Description of Contract and Location (Hotel, Factory etc)	Total contract value	Company/Firm (s) contract value	State Professional Services provided
1 to				
2 to				
3 to				

17) **Rent Reviews/Lease Renewals**

(a) Largest rent review undertaken	£	Average rent review undertaken	£
(b) Is there a working diary system in force?		(c) How often is the system checked?	

18)

Does the Company/Firm or any Partner/Director act on behalf of or undertake work for any firm, company or organisation in which the Company/Firm or any Partner/Director has a financial interest?	If 'YES' give details and the fees earned from such work:
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19)

Does the Company/Firm or any Partner/Director have any association with or financial interest in any other firm, company or organisation (other than as shareholders/stockbrokers in a publicly quoted company)?	If 'YES' give details of the nature of the association together with the name & business of the third Party:
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20)

Is the company/Firm or any Partner/Director a member of a consortium or joint venture?	If 'YES' give the names of other member/partners and their capacities in the consortium/joint venture:
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21)

Do all cheques drawn for more than £25,000 require two signatures?	YES		NO	
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22)

Has the Company/Firm suffered any loss during the past five years through fraud or dishonesty of any Employee, Director, Partner or Principal?	If 'YES' state date, circumstances, amount and steps taken to prevent recurrence:
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23)

Have you ever been authorised to conduct financial services business?	YES		NO	
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24)

Have any claims in respect of liabilities to be covered by the proposed insurance (successful or otherwise) been made against the Company/Firm or its present and/or past Partners/Directors?	If 'YES' give full details, including amounts involved:
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25)

Have all claims been notified to insurers?	YES		NO	
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Please provide details of what measures have been taken to prevent a recurrence of the situation which gave rise to each claim:	
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26)

Are any of the Partners/Directors after having made full enquiries aware of any CIRCUMSTANCES which may give rise to a claim against the Company/Firm or their predecessors in business or any of the present or former Partners/Directors?	If 'YES' give full details:
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27)

Are you presently insured?	YES		NO	
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Name of Insurer	Indemnity Limit	Excess	Premium	Renewal Date

28)

Has any application for this type of insurance made by you or your predecessors in business ever:				
(a) been declined?	YES		NO	
(b) been subject to an increased premium?	YES		NO	
(c.) been subject to special conditions?	YES		NO	
(d) been terminated by an Insurer?	YES		NO	
If the answer to any of the above is 'YES' please explain why:				

29)

Limit of Indemnity required	£
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