



## Surveyors and 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 first established:		
6. Firms business description:				
7. Is the Firm a RICS regulated firm?			Yes	No
8. Details of main Principals, Partners or Directors of the Firm: (CV's to be provided if under 5 years' experience)				
Full name	D.O.B	Qualifications		
9.	Ireland	USA/Canada	Other (Please specify)	Total
Total Gross Fees in last financial Year ending: ...../...../.....	€	€	€	€
Total Gross Fees for the current year:	€	€	€	€
Total Gross Fees for year preceding the last 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?			€	



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 for the last financial year (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	%
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. Do you undertake external wall fire reviews / EWS-1 forms?				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	
If Yes to any of the above (18-26), please provide full details at the end of the form				
<b>27. Risk Management</b>				
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				
<b>28. Claims and other circumstance statements</b>				
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
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If you answer 'False' to any of the questions above, please provide details at the end of the 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 proposal form 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):

**Your information**

We collect and use relevant information about you to arrange your insurance cover and to meet our legal obligations.

This information includes personal data such as your name, address, contact details and other information that we collect about you in connection with the insurance cover from which you benefit. This information may also include more sensitive data such as information about your health and any criminal convictions.

In certain circumstances, we may need your consent to process certain information about you and this is explained in our privacy policy. This is available to read and download at [www.robertsonlow.com/privacy-notice/](http://www.robertsonlow.com/privacy-notice/) or on request.

For the purpose of providing insurance and handling claims or complaints your information may be shared with, and used by, a number of third parties in the insurance and associated sectors e.g. advisers, agents, brokers, insurers, reinsurers, loss adjusters, solicitors, subcontractors, regulators, law enforcement agencies, fraud and crime prevention agencies. We will only disclose your personal information in connection with the insurance coverage that we provide and to the extent required or permitted by law.

**If you provide other people's details to us**

Where you provide us or your insurance adviser with information about other people, you must make them aware that you are doing so. Where possible, you should also provide them with this notice.

**If you would like more information**

For more information about how we use your personal information, please see our privacy policy which is available at [www.robertsonlow.com/privacy-notice/](http://www.robertsonlow.com/privacy-notice/) or on request.

If you need to contact us relating to any matter associated with this Privacy Notice, our contact details are listed below:

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**Email:** [compliance@howdeninsurance.ie](mailto:compliance@howdeninsurance.ie)

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