

Miscellaneous Short Proposal Form



Information

1. Please provide the following details (including all trading names and subsidiaries):

Name

Address including postcode

Establishment date

Website

2. Details of all principals, partners or directors:

Name	Age	Qualifications

3. Please complete the following

	UK	USA / Canada	Other	Total
Estimated total gross fees	£	£	£	£
Total gross fees in current year	£	£	£	£
Total gross fees in last financial year	£	£	£	£
Largest fee from any one client	£	£	£	£

4. Please give a full description of activities, with percentage breakdown (estimated if no historical data):

5. Please give details of your three largest contracts in the last five financial years (give details of current projects if new start-up):

Start date / end date	Name of client / business client	Nature of contract	Total contract value	Income to you

6. When entering into contracts please confirm:

- | | | |
|--|------------------------------|-----------------------------|
| a. You carry out work only under your standard contract, signed by every client? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b. All contracts are vetted by a legally qualified person before being agreed? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If **NO** to any of the above, please explain why not on a separate sheet

7. When entering into contracts do you always:

- | | | |
|--|------------------------------|-----------------------------|
| a. Exclude liability for consequential, special or indirect damages, loss of profits and liquidated damages? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b. Cap your overall liability at a reasonable level? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| c. Warrant a performance standard no greater than reasonable care and skill? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| d. Work to a written specification with your clients outlining the scope of each job? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| e. Ensure that changes to the scope of work are reflected in a written variation of the contract? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If **NO** to any of the above, please explain why not on a separate sheet

- | | | |
|--|------------------------------|-----------------------------|
| 8. Do you currently purchase professional indemnity insurance | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|--|------------------------------|-----------------------------|
-

9. What limit/s of indemnity do you require? £

10. In respect of any of the risks to which this proposal relates:

- | | | |
|---|------------------------------|-----------------------------|
| i. Has any claim been made (whether successful or not) against you, any predecessor, any past or present principals, directors, partners? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| ii. Has any loss been suffered by you or any predecessor as a result of the dishonesty or malice of any past or present principals, directors, partners, employees or self-employed person? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| iii. Are you, after full enquiry aware of any circumstance which is likely to give rise to a claim or loss against you, any predecessor or any past or present principal, director, partners? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| iv. Are you, after full enquiry aware of any shortcoming in your work for a client who is likely to give rise to a claim against you? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If **YES** to any of the above, please provide details on a separate sheet.

Please read this paragraph carefully before signing the declaration

It is essential that every Proposal, when seeking a quotation to take out or renew any insurance, discloses to the prospective Insurers all material facts and information (including all material circumstances) which might influence the judgement of an Insurer in deciding whether to accept the risk and on what terms. The obligation to provide this information continues up until the time that there is a completed contract of insurance. Failure to do so entitles the Insurers, if they so wish, to avoid the contract of insurance from inception and so enables them to repudiate liability thereunder. If you have any doubt as to what constitutes a material fact or circumstance please do not hesitate to ask for advice.

Declaration

On behalf of the Proposer/s, I/we declare that, after full enquiry, the contents of this proposal are true and that I/we have not misstated, omitted or suppressed any material fact or information. If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of insurance, I/we undertake to inform the Insurer.

Signature of Principal / Director / Partner:

Date:

ADDITIONAL INFORMATION