



# HERA INDEMNITY

MAKING A DIFFERENCE

SURVEYORS PROFESSIONAL INDEMNITY INSURANCE  
PROPOSAL FORM

# Surveyors Professional Indemnity Insurance Proposal Form

## Instructions

- This proposal form must be completed by a Principal, Director, Partner or Company Secretary of the Proposer.
- If there is insufficient space to provide answers, please supply additional information on a separate sheet of the Proposer's company headed paper.
- All questions must be answered.
- Completion of this proposal form does not bind the Proposer to complete the insurance. Please keep a record of all information supplied to us.

## Disclosure

- It is your responsibility, throughout the lifetime of a policy and at renewal, to provide us and your insurers with complete and accurate information. You should check carefully the details on the proposal form that have been completed on your behalf to ensure that they are correct.
- With regard to the insurance cover we arrange for you, you owe a duty of disclosure to the Insurer. Please refer to the Duty of Fair Presentation at the end of this proposal form. You must take reasonable care to provide complete, accurate and honest answers to the questions we ask when you take out, make changes to or renew your policy. This will include all information that is likely to affect both the assessment and acceptance of risks being insured, whether or not a specific question has been included in this Proposal Form. Failure to provide full and accurate information may invalidate your cover, thus any potential claim may be declined. If you are unsure whether you should disclose it or if you are in any doubt, do not hesitate to ask us.

## 1. Name of Firm (and any subsidiaries to be included in this insurance)

Name of Firm

Subsidiaries (if relevant)

## 2. Address (if more than one, please give each address to be included in this insurance)

Principal Address

Postcode

Other Addresses (if relevant)

Postcode

## 3. Principal Telephone Number, Fax, Email and Website Address

Telephone

Fax

Email

Website

## 4. Date Established

Day

Month

Year

**5. Is the Firm a member of any Professional or Trade Association? If Yes, please provide details**

**6. Please provide a list of all Principals, Partners, Directors including qualifications and year appointed**

Does any Director/Partner of the firm hold any financial interest, or office, in a client company?

If Yes, please provide details:

Yes

No

**7. Financial**

	UK	USA/Canada	Other	Total
Gross Fee income in last financial year	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Estimated Gross Fee for next financial year	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Largest fee from any one client	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

**8. Area of Practice – provide Gross fees allocated to each Area of Practice**

Architectural Work	<input type="text"/> %	Estate Agency	<input type="text"/> %
Town Planning	<input type="text"/> %	Residential Property Management	<input type="text"/> %
Feasibility Studies	<input type="text"/> %	Commercial Property Management	<input type="text"/> %
Landscape / Garden Architecture	<input type="text"/> %	Rent Reviews	<input type="text"/> %
Quantity Surveying	<input type="text"/> %	Aerial / Marine or Engineering Surveys	<input type="text"/> %
Residential Building Surveys / Valuations	<input type="text"/> %	Setting Out	<input type="text"/> %
Commercial Building Surveys / Valuations	<input type="text"/> %	Auctioneering	<input type="text"/> %
Interior Design (Structural)	<input type="text"/> %	Insurance or Building Society work	<input type="text"/> %
Interior Design (Non-Structural)	<input type="text"/> %	Investment Agency	<input type="text"/> %
Project Co-ordination	<input type="text"/> %	Expert Witness work	<input type="text"/> %
Project Management	<input type="text"/> %	Planning Supervisor	<input type="text"/> %
Building Surveyor	<input type="text"/> %	Other work (please specify)	<input type="text"/> %

Other (please provide details)

**9. Building Survey Reports and Valuations – provide the following undertaken in the last year**

Number of Building Surveys	<input type="text"/>	Average single property valuations	£ <input type="text"/>
Average property value surveyed	£ <input type="text"/>	Average portfolio valuation	£ <input type="text"/>
Largest value of property surveyed	£ <input type="text"/>	Largest single property valuation	£ <input type="text"/>
Number of valuations	<input type="text"/>	Largest portfolio valuation	£ <input type="text"/>

**10. Client contracts – provide the three largest contracts in the last five financial years**

Client	Description	Contract Values	Fee
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

**11. Claims**

Have any claims for professional negligence, error or omission been made against the Firm or their predecessors in business or any of the past or present Principals, Partners or Directors? Yes  No

If Yes, please provide details including date and cost/estimated cost of claim or loss.

If Yes, what steps have been taken to prevent a recurrence?

Are any Principals, Partners, Directors or employees after FULL ENQUIRY aware of any circumstances which may give rise to a claim against the Firm or their predecessors in business or any of the past or present Principals, Partners or Directors? Yes  No

If Yes, please provide details.

**12. General**

Has your policy ever been cancelled or special terms imposed? Yes  No

Has any Principal, Partner, Director or member of staff been involved in any fraud or dishonesty? Yes  No

Are there any letters of complaint about your services or ongoing fee disputes, or are there any circumstances / material facts which may give rise to a claim that should be disclosed to insurers? Yes  No

### 13. Insurance Information

Current Limit of Indemnity	£
Excess	£
Total Premium	£
Current Insurer	
Renewal Date	
Indemnity Required	£
Excess	£

### Declaration

The undersigned person declares that the above statements and particulars are true, to their best knowledge and belief, and have not suppressed or mis-stated any material facts.

Name of Director/Partner/Company Secretary

Date

Signature of Director/Partner/Company Secretary

Date

**If you have undertaken Surveying and Valuing since 2008 you will be required to complete an S & V Questionnaire. This can be found on our website <http://www.heraindemnity.co.uk> or please telephone Hera Indemnity on 020 7062 4020 to discuss in more detail.**

## IMPORTANT NOTICE – DUTY OF FAIR PRESENTATION

**The Insurance Act 2015 came in to force on 12th August 2016. Under this Act, you owe a duty of disclosure to the Insurer which includes your duty to make a fair presentation of the risk. A 'fair presentation' is one:**

- Which clearly discloses all material circumstances which the Insured's Senior Management (defined as those individuals who play significant roles in the making of decisions about how the Insured's activities are to be managed or organised), including persons responsible for the Insured's insurance, know or ought to know following a reasonable search or which is sufficient to make the Insurer ask questions about the risk. A circumstance is material if it would influence an Insurer's judgement in determining whether to take risk and, if so, on what terms. If you are in any doubt whether a circumstance is material we recommend that it should be disclosed:
- Which discloses information in a manner which is clear and accessible to a prudent insurer (ie no 'data dumping');
- In which every material representation as to a matter of fact is substantially correct and every material representation as to a matter of expectation or belief is made in good faith.

**Failure to disclose a material circumstance may entitle an Insurer to:**

- In some circumstances, avoid the policy from inception and in this event any claims under the policy would not be paid;
- Impose different terms on your cover, and / or
- Proportionately reduce the amount of any claim payable.

**This duty applies:**

- Before your cover is placed;
- When it is reviewed; and
- At any time that it is varied.

**Your policy wording may also provide that this duty continues for the duration of the policy.**

**You should contact us immediately for assistance if you are unsure whether information may be material, or if it comes to your attention that you may have not disclosed full and accurate information.**



**HERA INDEMNITY**

Broker at **LLOYD'S**

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