

**Professional Indemnity Insurance Proposal Form  
for Estate, Letting, Managing Agents and Related Professions**

This proposal form must be completed, signed and dated by a principal, partner or director of the firm who has been duly authorised by all principals, partners or directors for this purpose.

It is your duty to disclose all material facts to underwriters. A material fact is one that is likely to influence underwriters' judgement and acceptance of your proposal.

Please answer all general and underwriting questions. If there is insufficient space, please provide details on a separate sheet. In addition you are required to complete the declaration on the final page of the proposal form.

**This form is not suitable for surveyors. If you have undertaken or intend to undertake any survey and / or valuation work please call us on 020 8667 2108.**

Would you like a quotation for your office insurance? Yes  No

**General Information – Your details**

1. Date insurance cover to commence:
2. Proposer's name in full:
3. Trading styles and titles:
4. Address:
5. Tel No/Mobile No:
6. Email address:
7. Date established:
8. Business description:

### Underwriting Information

9. Please select the limit(s) of indemnity you require:      £100,000       £150,000   
 £250,000       £500,000       £1,000,000       Other:

10. Please provide details for all Principals, Partners or Directors:

Name	Position	Age	Professional Qualifications	Years with this firm	Total years experience*

\* If any Principal, Partner or Director has less than 3 years practical experience, attach their CV

11. Please state the total number of your:

Principals, Partners or Directors	Qualified Staff	Employees	Total

12. **Gross Fees** for last financial year:

UK	USA & Canada	Elsewhere	Total
£	£	£	£

13. Please split your total gross fees between the activities below. You may use either the column for "Fee Amount" or "Fee Percentage":

	Fee Amount	Fee Percentage
Estate Agency	£	%
Lettings and Management	£	%
Business Transfer Agency	£	%
Auctioneering	£	%
Building Society Agency	£	%
Mortgage Broking	£	%
Other (please give full details on a separate sheet)	£	%
<b>Totals</b>	£	%

14. Are you involved in any way in property transactions outside the UK? Yes  No

If **Yes**, please provide full details under question 20 below and on a separate sheet if necessary:

15. Has the firm ever undertaken any survey or valuation work?  
*Note : this does not apply to valuations undertaken to establish a market price for sale, rental, probate and matrimonial purposes* Yes  No

If **Yes**, please provide full details under question 20 below and on a separate sheet if necessary:

16. Have you ever undertaken any form of financial services work (e.g. general insurance, mortgage broking or investments), whether directly or as a representative or introducer? Yes  No

If **Yes**, please provide, under question 20 below, full details of the activities and your status with the Financial Conduct Authority.

17. Has any principal, partner, director or employee ever been subject to disciplinary proceedings by any professional body including RICS, NAEA, ARLA, NALS, ARMA & ICBA? Yes  No

If **Yes**, please provide full details under question 20 below and on a separate sheet if necessary:

18. Do you always obtain satisfactory references when engaging new employees? Yes  No

If **No**, please provide full details under question 20 below and on a separate sheet if necessary:

19. Does the Company have a diary system in place for rent reviews and/or renewal of tenancy agreements? Yes  No

If **No**, please provide full details under question 20 below and on a separate sheet if necessary:

20. Further Information:

21. Current insurance details:

Name of Insurer		Retroactive Date**	
Limit of Indemnity		Expiry Date	
Excess		Premium	

\*\* The "Retroactive Date" should be shown in your current policy schedule.

### Declaration

- A. Are you aware of any incidents over the last 5 years that have given rise to a claim, or loss, or may give rise to a claim, or loss, or which would have been covered by the proposed insurance had such a policy been in force? Yes  No

If **Yes**, Please give full details:

- B. After enquiry, are there any pending claims or circumstances that, might reasonably be expected to give rise to a claim or loss against
- a the firm
  - b the firm's predecessors in business, or
  - c any persons proposed for insurance
- that would fall within the scope of this insurance? Yes  No

- C. Have you, the proposer, or any principal, partner or director under a current or previous trading title:
- a been declared bankrupt or insolvent? Yes  No
  - b been convicted of arson or any other criminal offence (other than motoring offences) or is any prosecution pending? Yes  No

- D. Has any insurer declined to accept, cancelled, refused to continue or agreed to continue only on special terms any insurance for the proposer? Yes  No

***If you have answered YES to any of B, C or D, please provide details on a separate sheet.***

- E. I/We declare that the above statements and particulars are true to the best of my/our knowledge and I/we have not suppressed or misstated any material facts. Yes  No

Signed <input style="width: 90%; height: 30px;" type="text"/>	Dated <input style="width: 90%; height: 30px;" type="text" value="/ /"/>
Print FULL Name <input style="width: 90%; height: 30px;" type="text"/>	Position <input style="width: 90%; height: 30px;" type="text"/>

**NOTE:** This declaration must only be signed by a principal, partner or director of the above named firm who has been duly authorised by all principals, partners or directors for this purpose.

Correspondence address:	Portsoken Ltd Fileturn House, Brighton Road Redhill Surrey RH1 6QZ	Email:	property@portsoken.co.uk
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