


Professional Negligence for Social Housing Organisations

Blanket cover Proposal form

 Please provide a full answer to every question. Where there is insufficient space to answer a question please enclose additional sheets. Please note that the completion and submission of this form does not bind you or us to enter into a contract of insurance.

You understand that you must make a fair presentation of the risk to us when completing this form and at inception, renewal and whenever you request changes to your policy. This means that you must tell us about all facts and circumstances which may be material to the risks covered by the policy in a clear and accessible manner and must not misrepresent any material facts. A material fact is one which would influence our acceptance or assessment of the risk. If you have any doubt about facts considered material, it is in your interest to disclose them.

If you do not make a fair presentation of the risk the policy may be avoided, written on different terms and/or a higher premium may be charged, depending on the circumstances of the failure to present the risk fairly.

1. Name of Proposer

2. The Services

All activities undertaken by the Proposer on behalf of third party clients but excluding:

- a) architectural design
- b) work or advice associated with any design and build contracts
- c) quantity surveying or any surveying and valuation work
- d) civil engineering, mechanical engineering or electrical engineering
- e) treasury management or financial investment*
- f) any other services to be identified separately in the Proposer's insurance arrangements.

*Treasury Management means the measurement of cash flows, banking, money-market and capital-market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks. This includes the use of capital and project financings, borrowings, investment and hedging instruments and techniques.

Financial Investment means activities regulated by the Financial Conduct Authority or any successor authority or any advice or services relating to the financing or investment for any project, scheme or venture.

3. Sub-contractors and Consultants

Do you utilise sub-contractors or consultants?

☐ Yes ☐ No

If Yes, do you verify annually that they have their own PI insurance in force?

☐ Yes ☐ No

4. Insurance History

Has the Proposer ever been refused, or had cancelled, Professional Indemnity insurance?

☐ Yes ☐ No

Have any claims been made against the Proposer which would have fallen within the scope of the proposed insurance had it been in force?

☐ Yes ☐ No

Are any of the Proposer's senior or supervisory staff, **after individual enquiry from the Officer completing this form**, aware of any circumstances or incidents which might give rise to a claim?

☐ Yes ☐ No

If Yes, please provide full details:

Please continue on a separate sheet if more space is required.

5. Limit of Indemnity

Please state the Limit of Indemnity required

£

This limit will be an aggregate limit for all claims made annually during any one period of insurance.

6. Retroactive cover

Is Retroactive cover required for work which will already have been carried out at the inception of this insurance should it be accepted?

☐ Yes ☐ No

If Yes, please state the retroactive date required

D	D	M	M	Y	Y	Y	Y
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Note: This cover is 'claims made' which means that cover attaches at the time the claim is first made, not the time when the cause of the claim arose. The cause must, however, be after the retroactive date for the claim to be considered under this insurance.

7. Excess

Excess to apply in respect of each and every claim (minimum £2,500) £

8. Data Protection Statement

Zurich takes the privacy and security of your personal information seriously. We collect, use and share your personal information so that we can provide policies and services that meet your insurance needs, in accordance with applicable data protection laws.

The type of personal information we will collect includes: basic personal information (i.e. name, address and date of birth), occupation and financial details, health and family information, claims and convictions information and where you have requested other individuals be included in the arrangement, personal information about those individuals.

We and our selected third parties will only collect and use personal information (i) where the processing is necessary in connection with providing a quotation and/or contract of insurance; (ii) to meet our legal or regulatory obligations; (iii) where you have provided the appropriate consent; (iv) for our 'legitimate interests'.

It is in our legitimate interests to collect personal information as it provides us with the information that we need to provide our services more effectively including providing information about our products and services. We will always ensure that we keep the amount of information collected and the extent of any processing to the absolute minimum to meet this legitimate interest.

A full copy of our data protection statement can be viewed via www.zurich.co.uk/dataprotection

How you can contact us

If you have any questions or queries about how we use your data, or require a paper copy of the statement, you can contact us via gbz.general.data.protection@uk.zurich.com or alternatively contact our Data Protection Officer at Zurich Insurance, Unity Place, 1 Carfax Close, Swindon, SN1 1AP.

9. Declaration

I/we declare that the statement and particulars in this proposal are true and complete. I/we have made a fair presentation of the risk and have not misrepresented or suppressed any material facts after full enquiry of relevant parties within my/our organisation. I/we agree to the contract of insurance being prepared using the information I/we have supplied in this form, along with any associated information I/we have supplied. I/we shall inform you of any material alteration to those facts and/or the information supplied before completion of the contract of insurance.

Signed

Date

D

D

M

M

Y

Y

Y

Y

Name

Role

Zurich Municipal is a trading name of Zurich Insurance Company Ltd.
A public limited company incorporated in Switzerland. Registered in the Canton of Zurich, No. CHE-105.833.114, registered offices at Mythenquai 2, 8002 Zurich. UK Branch registered in England and Wales no BR000105. UK Branch Head Office: The Zurich Centre, 3000 Parkway, Whiteley, Fareham, Hampshire PO15 7JZ.
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