

Public Services Professional Negligence

Specific services proposal form

Please note that the completion and submission of this form does not bind you or us to enter into a contract of insurance. In order to minimise the need for further clarification please answer all questions fully.

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 or a higher premium may be charged, depending on the circumstances of the failure to present the risk fairly.

1. Name of Organisation

2. Department or Directorate

3. The Services

Please give a full and precise description of the Services to be insured, including any planned changes or any commissions you are likely to accept of a type not previously undertaken. Please state if any aspect of the Services is regulated by the Financial Conduct Authority and provide full details separately.

4. Outside client details

Please note this insurance applies to outside clients and not to work done for other departments within the organisation or for internal cost centres. Please list the categories of outside clients for whom the Services are provided.

5. Fee income

Please state the total gross fee income earned during each of the past 3 years in respect of the Services, including the estimated income for the current/forthcoming year.

Last year	£	2 years ago	£
Current/next year	£	3 years ago	£

6. 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

7. Claims made/pending

Is the Proposer aware, **after full enquiry from all senior and supervisory staff**, of any circumstances which have resulted or may result in a claim being made against the Proposer or against any of its employees (past or present) in relation to the Services described under question 3 which would have fallen or would fall to be dealt with under Professional Indemnity insurance had such insurance been in force?

Yes No

If Yes, please attach a statement giving details.

8. 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.

9. 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 Retro Date required

NB: This cover is 'claims made' which means that cover attaches at the time the claim is first made, not at the time when the cause of the claim arose. The cause must, however, be after the Retro Date for the claim to be considered under this insurance.

10. 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

Name

Position

Zurich Municipal

Zurich Municipal is a trading name of Zurich Insurance plc.
A public limited company incorporated in Ireland Registration No. 13460.
Registered Office: Zurich House, Ballsbridge Park, Dublin 4, Ireland.
UK Branch registered in England and Wales, Registration No. BR7985.
UK Branch Head Office: The Zurich Centre, 3000 Parkway, Whiteley, Fareham, Hampshire PO15 7JZ.

Zurich Insurance plc is authorised by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority. Details about the extent of our regulation by the Financial Conduct Authority are available from us on request. These details can be checked on the FCA's Financial Services Register via their website www.fca.org.uk or by contacting them on 0800 111 6768. Our FCA Firm Reference Number is 203093.

Communications may be monitored or recorded to improve our service and for security and regulatory purposes.

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