

Professional Indemnity Cover
Proposal Form

The completion of this form in no way does not bind the proposer to purchase insurance, nor does it bind the underwriters to give insurance. Any information given will only be passed to underwriters for the purpose of quotation renewal terms and will be treated as confidential. Details provided are for automatic cover provided by the Countrywide master policy Professional Indemnity policy.

Name:	Establishment Date:
Address:	

Details of all Principals, Partners or Directors:		
Name	Age	Qualifications (attach CV's if available)

Estimates for work undertaken by Countrywide Tax and Trust Corporation Limited or documentation produced using software developed by Countrywide Tax and Trust Corporation Limited				
UK	USA/Canada	Other	Total	
Estimated Gross Fees for the next financial year	£	£	£	£
£				
Largest Fee from any one client	£	£	£	£
£				

Cover is provided in respect of document production undertaken by Countrywide Tax and Trust Corporation only except contract 'D'. Please provide details paid fees to other professional providers for the last financial year. £

Details of the 3 largest contracts in the last 5 financial years and provide details largest current projects (if new business) for Countrywide Tax and Trust Corporation Limited		
Contract Value	Client Fee	Description
1		
2		
3		

Have any claims in respect of the risks to which this form relates ever been made against the business or any of the principals, partners or directors? YES/NO

Are any of the principals, partners or directors, **AFTER FULL ENQUIRY**, aware of any circumstance that might give rise to any such claim? YES/NO

Has any proposal in respect of the risks to which this form relates ever been declined or has any such insurance ever been cancelled or renewal refused? YES/NO

If the answer to any of the above 3 questions is **YES**, then please provide full details on a separate sheet.

Other Material Information

Does the firm currently hold Professional Indemnity Insurance for this class of business? YES /NO

If Yes - Insurer Renewal Date

Date cover originally placed where cover has been continuous since.....

You have a duty to give a fair presentation of the risk to an insurer based on your reasonable understanding of the risks to your business. This is one which clearly discloses all material facts which your senior management and the persons responsible for arranging your insurance know, or ought to know, following a reasonable search of information available to them. It should include all facts that would influence the judgement of the insurer or that would put the insurer on notice that it needs to make further enquiries.

A material circumstance is defined as:

- *Special or unusual circumstances relating to the risk;*
- *Any particular concerns which led you to seek insurance cover for the risk; and*
- *Anything which those concerned with the class of insurance and field of activity in question would generally understand as being something that would be dealt with in a fair presentation of risks for this type of insurance.*

If you fail to disclose information, misrepresent any fact which may influence the insurer's decision to accept the risk or the terms offered, or fail to make a fair presentation to an insurer, this could invalidate the policy and mean that claims may not be paid in full."

Signature of Proposer(s) _____ Title of signatory _____ Date ____ / ____ / ____