



Personal Touch Financial Services Ltd

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Professional Indemnity Proposal Form – Engineers

**Personal Touch Financial Services Ltd is authorised
and regulated by the Financial Services Authority**

5. Work Breakdown (Operations)

Enter percentages for the firm's last year of trading. New start-ups enter estimated percentages for your first year of trading.

	%		%
Airport / Rail		Industrial Systems/Factories	
Bridges/Tunnels		Low Rise Multiple Housing	
Chemical/Petro Chem Plants		Mechanical Plant/Bulk Handling	
Communication Systems		Municipal	
Dams/Mines		Nuclear / Atomic Power Plants	
Ecclesiastical		Retail/Shops	
Harbours/Jetties/Silos		Roads/Highways/Motorways	
High Rise (Flats/Offices)		Schools/Universities	
Hospitals/Nursing Homes		Sewerage/Water Schemes	
Hotels/Leisure		Transport Systems	
Housing (Individual)		Other (please specify)	

6. Work Breakdown (Disciplines)

Enter percentages for the firm's last year of trading. New start-ups enter estimated percentages for your first year of trading.

	%		%
Air Conditioning		Landscape Architecture	
Architecture		Mechanical Engineering	
Building Surveying		Nuclear Engineering	
Chemical Engineering		Other Setting Out	
Civil Engineering		Piling Setting Out	
Drafting/C.A.D.		Planning Supervision	
Electrical Engineering		Project Coordination	
Electronic Engineering		Project Management	
Environmental Consultancy		Quantity Surveying	
Expert Witness		Restoration/Rehabilitation/Refurbishment	
Feasibility Studies		Soil Engineering	
Foundations/Underpinning-design/set out		Structural Engineering	
Heating/Ventilation/Air Conditioning		Structural Surveys	
Highways Engineering		Town Planning	
Interior Design		Other (please specify)	
Land Surveying			

7. Please list the firm's 5 largest contracts

a) During the last 5 years

Start Date	Approximate Completion Date	Brief Description of Contract & Location	Total Contract Value	Company/Firm Contract Value

b) Expected to commence during the next 12 months

Start Date	Approximate Completion Date	Brief Description of Contract & Location	Total Contract Value	Company/Firm Contract Value

8. Specific Work Related Questions

What percentage of environmental work has the firm undertaken in the last year?	%
In the last year, what percentage of fee income derived from aborted work where nothing "physical" resulted?	%
Is the firm a member of a consortium or joint venture?	YES/NO
Has the firm been engaged, or given advice, in relation to setting out &/or piling?	YES/NO
If "yes", please attach details.	
Has the firm been involved in any contracts whose value was in excess of £1m in the last 5 years?	YES/NO
Has the firm been involved in any contracts whose value was in excess of £3m in the last 5 years?	YES/NO

9. Claims and Notifications

If the firm has had any claims or notifications in the last 10 years, please attach a schedule indicating date, amount, brief details and what steps have been taken to prevent a recurrence.

After enquiry of all partners/directors and staff, are you aware of any pending claim or circumstance which may give rise to a claim (including any letters of complaint about your service or dispute as to outstanding fees) or are there any material facts that should be disclosed to insurers? If "YES", please advise details. Continue on a separate sheet if necessary. YES/NO

10. General Questions

Has your policy ever been cancelled or had special terms imposed? If "YES", please give details. YES/NO
Continue on a separate sheet if necessary.

Has any partner or member of staff been involved in any fraud or dishonesty? If "YES", please advise details. Continue on a separate sheet if necessary. YES/NO

Does any director/partner of the firm hold any financial interest, or office, in a client company? If "YES", please advise details. Continue on a separate sheet if necessary. YES/NO

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Does the firm engage in construction, erection, installation or supply of materials? If "YES", please advise details. Continue on a separate sheet if necessary. YES/NO

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11. Insurance Details

Current limit of indemnity		Excess	
Premium		Renewal Date	
Current Insurer			
Limits of indemnity required			
Excess(es) required			

12. Declaration

I/we declare that the statements and particulars of this proposal form are true and that I/we have not mis-stated or suppressed any material facts. I/we agree this proposal form and any other information supplied by me/us shall form the basis of any contract of insurance effected thereupon. I/we undertake to inform Insurers as soon as practicable of any material alteration to these facts occurring before the renewal of my/our contract of insurance.

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Signature of Director / Partner

.....
Date