

The Insurance  
**Supermarket**



Personal Touch Financial Services Ltd

Trinity 3  
Trinity Park  
Birmingham  
B37 7ES  
Tel:0121 767 1070  
Fax:0121 767 1015  
Email:pi@personaltouchfs.com

**Professional Indemnity Proposal Form – Media & Marketing**

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



### **IMPORTANT NOTICE**

**This proposal must be completed and signed by a Principal, Partner or Director of the Proposer. The person completing and signing the form should be authorised by the Proposer to do so and should make all necessary enquiries of his fellow Partners, Directors and Employees to enable all the questions to be answered.**

**All questions must be answered to enable a quotation to be given.**

**Completing and signing this proposal does not bind the Proposers or Underwriters to enter a contract of insurance.**

**If there is insufficient space to answer questions, please use an additional sheet and attach it to this form (please indicate section number).**

## Media and Marketing



Please complete this Proposal form in **BLOCK CAPITALS** to avoid problems when transmitting by fax.  
For additional information or information that you cannot fit into the spaces provided please use a separate sheet.

- 1) Please provide the following details:

Name of Practice		
Address		
		Postcode
Telephone	Email	Fax
Web Site Address		
Practice establishment date		

- 2) This insurance can be extended to include associated, subsidiary and predecessor businesses, or the previous. Business activities of any Principal, provided that they are listed below or on a separate sheet and all the information you give in this proposal form relates to all the companies named:

Name	Location (City / Town)	Nature of Operation of Business

- 3) Please provide the following details:

Name in full of all Principals	Qualifications	How long with Proposer/s	Years in the Industry

If this is a new business or where a Principal has been working in the relevant industry for less than five years, please attach their brief CV.

- 4) Please state total numbers of:

Creative Staff		Other Technical Staff	
Administrative Staff		Other	

- 5) Do you use independent sub-contractors?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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If YES, please state:

(a) What percentage of your current financial year's turnover will be paid to subcontractors?

%

(b) For which work are they used and how do you select and manage them?

(c) Do you ensure they have their own PI insurance?

YES

NO

6) Is your business a member of any professional organisation or trade association?

YES

NO

If YES, please provide full details:

7) (a) Please give details of the five largest contracts commenced in the past three years:

Start Date / End Date	Name of client / Business of client	Nature of contract	Total Value	Income to you
1				
2				
3				
4				
5				

(b) Within the past three years, what is the average value of all contracts you get involved in?

£



8) Please state:

(a) Turnover including fee income:

	Past Year Ending / /	Estimate for Whole Current Year	Estimate for Coming Year
Total Turnover including Fee Income	£	£	£

Estimated percentage split of your turnover including fee income for:

Work carried out for UK clients	%	%	%
Work carried out for US / Canadian clients not subject to US / Canadian law	%	%	%
Work carried out for US / Canadian clients subject to US / Canadian law	%	%	%
Work carried out for clients anywhere else in the world	%	%	%
Operating profit	£	£	£

(b) Split of turnover including fees in the past year or if a new firm your anticipated figures:

<b>Commercial TV</b>	
Production of advertisements	£
Media spend (whether purchased by you or by media independent relative to your creative work)	£
<b>Other Media</b>	
Production of advertisements	£
Media spend (whether purchased by you or by media independent relative to your creative work)	£
Printed Literature / Documents	£
<b>Direct Marketing</b>	
Mail shots	£
Postage costs	£
Telemarketing	£
Database management and list broking	£
<b>Sales Promotion</b>	£
<b>Marketing (including all market research)</b>	
Fees	£
Production costs	£
<b>Public Relations</b>	
Fees	£
Production costs	£
<b>Specialist Design (Graphic Design)</b>	
Fees	£
Production costs	£
<b>Specialist Design (Corporate Identity)</b>	
Fees	£
Production costs	£
<b>Other work (details please)</b>	£
<b>TOTAL TURNOVER INCLUDING FEE INCOME*</b>	£

\* Please note this figure should be as per answer to Question 8(a) for the past year ending

Media and Marketing



- (c) i) What is your largest mailing (by number of pieces mailed)?
- ii) What is your average size mailing?
- iii) Do you do 100% mailings?  YES  NO

If YES, please give details:

- 9) (a) i) Do you always have a written specification with your clients for each job which includes campaign details, volume, quality, timings and sign off procedures?  YES  NO
- ii) Are all deviations to the above specification contract reported?  YES  NO
- iii) Do you always use a purchase order, or equivalent, when employing subcontractors which mirror any client obligations for each contract?  YES  NO
- iv) Do you always obtain final client sign off before going to print?  YES  NO
- (b) Do you commit your clients to contracts with third parties?  YES  NO
- If YES, do you always obtain your clients' written acceptance of the term of contracts before committing them?  YES  NO

If NO please provide details



(c) Does the above split accurately reflect:

(i) Your business activities in the past?

YES  NO

(ii) Your estimate business activities during the coming year?

YES  NO

If NO to either of the above, please explain the differences:

(d) Details of what you regard as your speciality within this industry, including your main areas of expertise. If you are a new firm, please provide details of your anticipated specialisation:

10) (a) DO NOT ANSWER IF THIS PROPOSAL IS FOR RENEWAL OF INSURANCE WITH HCC

Name of current insurers	
Name of your broker	
Renewal date	
Limit of indemnity	
Premium	
Excess	

(b) For what Limit/s of Indemnity are quotations required?



11) (a) Has any claim been brought against you arising from the performance of your business activities for a client or has anyone threatened to bring such a claim?

YES  NO

If YES, please provide full details:

(b) Are you aware of any shortcoming in your work for a client who is likely to lead to a claim against you? This includes i) a shortcoming known to you, but not your client, which you cannot reasonably put right; ii) a complaint from your client about your work or anything you have supplied which cannot be immediately resolved; iii) an escalating level of complaint from your client on a particular project; iv) a client withholding payment due to you after any complaint:

YES  NO

If YES, please provide full details:

(c) i) Have you suffered any loss from the dishonesty or malice of any partner, director, employee or self-employed freelancer?

YES  NO

ii) Do you currently have any grounds, after reasonable enquiry, for suspecting that such a person has acted dishonestly or maliciously?

YES  NO

If YES to either, please provide full details:

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**Please read this paragraph carefully before signing the declaration:**

It is essential that every Proposer or Insured when seeking a quotation to take out or renew any insurance discloses to the prospective Insurers all material facts and information (including all material circumstances) which might influence the judgement of an underwriter in deciding whether to accept the risk and on what terms. The obligation to provide this information continues up until the time that there is a completed contract of insurance. Failure to do so entitles the Underwriters, if they so wish, to avoid the contract of insurance from inception and so enables them to repudiate liability thereunder. If you have any doubt as to what constitutes a material fact or circumstance please do not hesitate to ask for advice.

**DECLARATION**

I/we declare that, after full enquiry, the contents of this proposal are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this proposal together with any other information supplied by me/us shall form the basis of any contract of insurance which may be effected. If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of insurance, I/we undertake to inform Underwriters.

I/we hereby consent to any information I/we have provided being processed by you for the purposes of providing insurance and claims handling, which may necessitate sharing such information with third parties. HCC International Insurance Co Plc may use this information for marketing (by post, telephone, e-mail or fax) subject to the conditions of the Data Protection Act. If you do not wish these details to be used for marketing please inform HCC International Insurance Co Plc in writing. Under the Data Protection Act 1998 you have the right to access or amend the information we hold about you. If you would like to exercise either of these rights please contact HCC International Insurance Co Plc.

Signature of Principal:

Date:

**This proposal should be accompanied by a copy of your standard terms and conditions**

A copy of this proposal should be retained by you for your own records

PLEASE USE THIS SPACE FOR ANY ADDITIONAL INFORMATION