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lifadmin@khanyisabrokers.co.za**PROFESSIONAL INDEMNITY PROPOSAL FORM - SURVEYORS**

- 1)
- NAME/S**
- (including trading names) of the Proposer/s: (use a separate sheet if necessary)

Name	Date Commenced

- 2)
- ADDRESS/ES**
- of Proposer/s

All addresses must be shown together with the Principal responsible for the work at each office:

Address	Principal in charge	Approx % of total fees

- 3)

Name in full of all Principals	Qualifications	Date Qualified	How long as a Principal with Proposers

SHARING THE LIGHT TO GROW OTHERS

4) Is cover required for the previous business activities of any Principal?

YES		NO	
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IF YES, please state:

Name of Principal			
Name of Previous Firm			
Period	From / / To / /	From / / To / /	From / / To / /
Fees for Last 3 Yrs	20 R 20 R 20 R	20 R 20 R 20 R	20 R 20 R 20 R
Reason for Leaving			
Position in Firm			
Is there separate insurance covering the activities of this firm for the Period stated above?			

5) Is cover required for predecessor practices to the Proposer/s?

YES		NO	
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IF YES, please provide full details:

Name of Predecessor	Date Commenced	Date Ceased	Reason for Cessation

6)

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

7) Please state total numbers of:

Principals	
Qualified staff	
Others	

8) (a) Do you sub-contract work to any outside party?

YES		NO	
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IF YES, please provide details:

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(b) Do you require any sub-contractor or consultant to be indemnified under your insurance?

YES		NO	
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IF YES, please state:

Name	Qualifications	Fees Paid (last financial year)

9) State for the whole Proposer/s

(a) Gross fees received:

	Last Complete Year	Current Year	Forthcoming Year
Year End	/ /20	/ /20	/ /20
Home	R	R	R
Overseas	R	R	R

(b) Split of Gross Fees in the last complete financial year:

Quantity Surveying	%
Building Surveying	%
Residential Estate Agency	%
Commercial Estate Agency	%
Residential Property Management	%
Commercial Property / Land Management	%
Rent Reviews / Lease Renewals	%
Land / Mineral / Hydrographic Surveying	%
Planning & Development Consultancy (without detailed plans)	%
Project Co-ordination	%
Project Management	%
Architectural Work	%
Residential Surveys / Valuations for lending purposes	%

Other Residential Surveys / Valuations	%
Commercial Surveys / Valuations for lending purposes	%
Other Commercial Surveys / Valuations	%
Building Society Agency	%
General Insurance Business	%
Financial Services	%
Auctioneering	%
Other	%
	100%

10) Please provide more details of the work that you have done in the past:

(a) **Quantity Surveying**

Average total contract value of jobs worked upon in last 3 years:

R

Highest total contract value of an individual job in last 3 years:

R

(b) **Commercial Estate Agency**

Average individual property value handled in last 3 years:

R

Highest individual property value handled in last 3 years:

R

(c) **Commercial Property / Land Management (inc Rent Reviews etc)**

Is there a working diary system which is checked regularly?

YES NO

(d) **Project Co-ordination** (no responsibility for appointment of other consultants / contractors)

Highest total contract value of an individual job in last 3 years:

R

(e) **Project Management** (with responsibility for appointment of other consultants / contractors)

Highest total contract value of an individual job in last 3 years:

R

Do you endeavour to ensure that other professional consultants maintain adequate P.I. insurance of their own?

YES NO

(f) **Architectural Work**

Please give details of the 3 largest contracts where construction has commenced during the past 3 years:

Description	Total Contract Value	Extent of Service	Appx Completion Date

(g) **Residential Surveys / Valuations for Lending Purposes**

For the last 3 years, please state approximately:

Average annual number of reports	Highest single property valuation	Average Valuation
	R	R

Please identify your **three** largest clients:

Name	Annual Fee Income
	R
	R
	R

(h) **Commercial Surveys / Valuations for Lending Purposes**

For the last 3 years, please state approximately:

Average annual number of reports	Highest single property valuation	Highest portfolio valuation	Average Valuation
	R	R	R

Please identify your **three** largest clients:

Name	Annual Fee Income
	R
	R
	R

(i) **Other Commercial Surveys / Valuations**

For the last 3 years, please state approximately for your **three** largest valuations:

Valuation	Client	Purpose
R		
R		
R		

Do you have any system for the cross-referencing of valuations for similar properties?

YES		NO	
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IF YES, how long has this system been in operation?

	years
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IF NO, how would you support the accuracy of any valuation?

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(j) **Financial Services**

Do you undertake any Financial Services activities?

YES		NO	
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Are you tied (for the purposes of the Financial Services Act) to any organisation?

YES		NO	
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IF INDEPENDENT, how are you regulated?

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(k) **Auctioneering**

For the last complete financial year, please state:

	Fees	Max Value	Ave Value
Livestock & Deadstock	R	R	R
Fine Art or Antiques	R	R	R
Property or Land	R	R	R
Other (please give details)	R	R	R

(l) **Other**

Please give full details:

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- 11) (a) If **no** income has been declared in any part of Question 9(b), have you provided any of these services in the last **three** financial years?

YES		NO	
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IF YES, please state:

	Fees Year End	Fees Year End	Fees Year End
Services Provided	/ /	/ /	/ /
	R	R	R
	R	R	R
	R	R	R

- 12) Most insurers now exclude liability arising from claims involving pollution. Occasionally, it can be possible to obtain limited cover for such claims. Please state:

- (a) Do you knowingly undertake any work which involves contaminated or polluted land or property, or provide advice as to whether or not land or property might be contaminated or polluted?

YES		NO	
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IF YES, please ask for a Pollution Questionnaire.

- (b) If available, do you require a quotation to include coverage for claims involving pollution?

YES		NO	
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- 13) (a) Are you or have you at any time been a member of a consortium or group practice or engaged with any other party in a Single Project Partnership?

YES		NO	
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IF YES, please give full details (including names of other parties)

(Special arrangements must be made to cover this type of work)

- (b) Does the Proposer/s or any Principal have any association with or financial interest in any other Practice, Company or Organisation for whom work is carried out and where cover is required?

YES		NO	
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IF YES, please give full details of the nature of the work and association together with the **name** and **business** of the third party.

Fees from this source in last complete financial year: \$

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

There will be a minimum level of uninsured excess. Is a quotation required with a voluntary excess to achieve a premium saving? If so, for what level of excess?

15) (a) In the last **10** years, in respect of **ANY** of the risks to which this proposal relates, has any Claim been made (whether successful or not) against the Proposer or any past or present Principal?

YES		NO	
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Has any loss been suffered by the Proposer, any predecessor or any past or present Principal in respect of **ANY** of the risks to which this proposal relates?

YES		NO	
-----	--	----	--

IF YES, please give details:

Date of claim/loss	Brief details of each claim/loss	Cost of claim/loss	Estimated cost of claim/loss outstanding

(b) What steps have been taken to prevent a recurrence?

16) Is any Principal, **AFTER FULL ENQUIRY**, aware of any circumstance which might:

(a) give rise to a claim against the Proposer, any predecessor or any past or present Principal?

YES		NO	
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(b) cause any loss to the Proposer, any predecessor or any past or present Principal?

YES		NO	
-----	--	----	--

(c) Has any proposal for similar insurance made on behalf of the Proposer or any of the present or past partners, directors or principals, or on behalf of any predecessor to the Proposer ever been declined or has any such insurance ever been cancelled or renewal refused?

YES		NO	
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(d) otherwise affect the consideration of this proposal for insurance?

YES		NO	
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IF YES to any of the above, please give details:

Please read this paragraph carefully before signing the declaration:

It is essential that every Proposer or Assured when seeking a quotation to take out or renew any insurance discloses to the prospective Underwriters 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.

Dated this _____ day of _____ 20____

Signature of Principal:

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

PLEASE NOTE: This Proposal Form should be completed by YOU and signed by YOU. If the Proposal Form has been completed by your BROKER, review the Proposal Form before signing it. DO NOT sign a BLANK Proposal Form.

PLEASE USE THIS SPACE FOR ANY ADDITIONAL INFORMATION