

PROFESSIONAL INDEMNITY POLICY (ACCOUNTANTS) PROPOSAL FORM

QUESTIONS

ANSWERS

1. Name and address(es) of the Firm:	<input style="width: 95%;" type="text"/>			
2. Full name of each Partner, qualifications and when qualified, how long practising as a partner in the Firm, and name(s) of Firm(s) in which he previously practised.:				
Name	Qualifications	When Qualified	How long practising as a partner in the Firm	Previous Firm(s)
3. Total numbers of Partners and Staff				
(a) Partners	<input style="width: 95%;" type="text"/>			
(b) Staff, other than Typist and Office Boys	<input style="width: 95%;" type="text"/>			
(c) Typists and Office Boys	<input style="width: 95%;" type="text"/>			
4. When was the Firm Established		<input style="width: 95%;" type="text"/>		
5. Does the Firm's practice extend or has it ever extended to activities abroad? If so, please indicate				
(a) what percentage this is/was of the Firm's total business &	<input style="width: 95%;" type="text"/>			
(b) method of handling such business	<input style="width: 95%;" type="text"/>			
6. Total indemnity required (inclusive of any extensions).		<input style="width: 95%;" type="text"/>		
7. If available, do the Firm require:-				
Extension 1 - Libel and Slander	<input style="width: 95%;" type="text"/>			
Extension 2 - Partners' Previous Business				
(a) Incoming Partners	<input style="width: 95%;" type="text"/>			
(b) Outgoing Partners	<input style="width: 95%;" type="text"/>			
Extension 3 - Amendment of Dishonesty Exclusion	<input style="width: 95%;" type="text"/>			
Extension 4 - Fidelity	<input style="width: 95%;" type="text"/>			
(Extension 4 is granted only in conjunction with Extension 3)				
Extension 5 - Loss of Documents	<input style="width: 95%;" type="text"/>			
8. If Extension 2(b) (Outgoing Partners) is required please give				
(a) full names of the former Partner to whom it is to apply &	<input style="width: 95%;" type="text"/>			
(b) dates when they ceased to be partners in the Firm	<input style="width: 95%;" type="text"/>			

9. If Extension 4 (Fidelity) is required please answer the following questions:-

(a) Amount of insurance required.

(b) Have the Firm any Fidelity Guarantee in force at present? If so, please give particulars.

(c) Have any insurers ever cancelled or refused to accept or continue any Fidelity Guarantee for the Firm or in respect of any of the Firm's present employees?

(d) Have the Firm sustained any loss through dishonesty of any employee? Do the Firm know of any fraud or dishonesty at any time of any present or former employee? If so, please give details, and state the

(e) Do the Firm always require satisfactory references when engaging employees?

(f) Is any employee allowed to sign cheques on his signature alone

(g) How often and by whom are the entries in the Cash Books checked with the vouchers and reconciled with the Bank Statements?

10. Has any application for insurance of this nature made on behalf of the Firm or their predecessors in business or any of the present Partners ever been declined or has any such Insurance ever been cancelled or renewal refused or have special terms been imposed? If so, please give full particulars.

11. Have any claims ever been made against the Firm or their predecessors in business or any of the present or former

12. Are any of the Partners, after enquiry, aware of any circumstance which is likely to give rise to a claim against the Firm or their predecessors in business or any of the present or former Partners? If so, please give full particulars

DECLARATION

I/We hereby declare that the above Statements and particulars are true and that I/We have not suppressed or misstated any material facts and I/We agree that their Proposal Form shall be the basis of the contract with the Underwriters.

Name of Firm:

*By (Partner):

Date: