

# Kingfisher Proposal

COMBINED LIABILITY & PROFESSIONAL INDEMNITY

FOR:  
MARINE ENGINEERS  
NAVAL ARCHITECTS  
MARINE SURVEYORS  
&  
YACHT BROKERS



**Everard**

INSURANCE BROKERS LIMITED

Blake House, Schooner Court, Admiral's Park  
Crossways, Dartford, Kent DA2 6QQ  
Telephone: 01322 394500 Fax: 01322 311933

***This Proposal form must be completed by a Partner/Director/Principal of the Proposer(s). Would you please answer all questions to enable us to provide an accurate quotation. If there is insufficient space to answer questions, please use an additional sheet and attach it to this form.***

Name(s) of the Firm(s):

Business Description:

Has the name changed in the last five years or has any amalgamation taken place?	YES	NO
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If YES, please give details and identify those firms for which cover is required.

Address(es) of all offices:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Postcode: \_\_\_\_\_

Telephone Number(s):

Date of Establishment of Firm(s):

**1. Institutes/Associations to which Partners/Directors/Principal of the Firm(s) are admitted:**

	Membership Status	Date of Admission
a) Yacht Brokers Designers & Surveyors Assoc		
b) Royal Institute of Naval Architects		
c) Institute of Marine Engineers		
d) Society of Consulting Marine Engineers & Ship Surveyors		
e) International Institute of Marine Surveying		
f) Other professional body/organisation		

**2. Give details below of Partners/Directors/Principal (including details if sole practitioner):**

Names	Age	Qualifications	Year Received	Number of Years in this capacity	
				This Firm	Elsewhere

**3. Give details below of number of permanent staff, including consultants under contract of service with the Firm(s):**

a) QUALIFIED  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

b) ALL OTHERS  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

**c) Please provide Current Wageroll:**

QUALIFIED  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

ALL OTHERS  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

**Please provide Estimated Wageroll for the forthcoming year**

QUALIFIED  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

ALL OTHERS  
 i) Full-time \_\_\_\_\_ ii) Part-time \_\_\_\_\_

(NB: Omit ancillary staff such as cleaners, lift attendants, drivers and the like)

**4. Is cover required for any independent engineer, architect, surveyor or any other consultant to whom work is sub-contracted?**

YES	NO
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If YES, please identify:

Name	Qualifications	Fees Paid (last financial year)

If YES, please explain the control the Firm(s) maintain over each sub-contractor:

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**5. Is cover required for any partner named in Question 2 for liability arising out of a previous business?**

If YES, please give details:

Name	Name of previous firm	Date of leaving	Nature of business of previous firm



**10a. Are you, after having made FULL ENQUIRES of all the Partners/Directors and employees of the Firm(s), aware of any of the following matters:**

- i. Any circumstances which may give rise to a claim against the Firm(s), it's/their predecessors in business or any present or past partners 

YES	NO
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  - ii. The receipt of any complaints, whether oral or in writing, regarding services performed or advice given by the Firm(s) on behalf of the Firm(s)? 

YES	NO
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  - iii. Any Partner/Director of the Firm(s) or the Firm(s) having been subject to a disciplinary hearing which was upheld? 

YES	NO
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- b. Are you currently involved in taking legal action for the recovery of outstanding fees owed to the Firm(s)** 

YES	NO
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- c. Do you have any account(s) outstanding for unpaid fees after six months from the date of submission of first account?** 

YES	NO
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IF THE ANSWER TO ANY PART OF QUESTION 11 IS YES, PLEASE PROVIDE FULL DETAILS.

**11a. State total gross fees for the last five financial years:**

Year..... £	Year..... £	Year..... £	Year..... £	Year..... £

- b. State estimated gross fees and/or commission (including fees to sub-contractors) for the forthcoming financial year.** £ \_\_\_\_\_
- c. State largest fee or commission earned from any one client in the last financial year:** £ \_\_\_\_\_

**12. Please indicate the approximate percentage of fees and/or commission for each of the following categories in the last financial year (for new practices, please complete on an estimated basis):**

	%
a) Yacht Broking (sales and purchases)	_____
b) Surveys	_____
i. Condition Surveys of vessels	_____
ii. Damage Surveys	_____
iii. Valuation Surveys	_____
iv. Machinery, Electrical and Ancillary Equipment Surveys	_____
v) Consultancy (preliminary inspections Partial surveys trial supervision)	_____
c) Naval Architects and Design	_____

**13. In respect of each of the three categories detailed in Question 13, state during the last financial year (for new practices, please complete on an estimated basis)**

**a) The class(es) of vessels (commercial or pleasure) concerned**

- i. Yacht Broking**
- ii. Surveys**
- iii. Design**

**b) The number of vessels in the value table below (the value of the vessel is that at the date of sale, purchase, survey or anticipated at completion of construction).**

	Category	£0-£20,000	£20,000-£50,000	£50,000-£100,000	£100,000 +
i.	Yacht Broking				
ii.	Surveys				
iii.	Design				

**14. Does the Proposer(s) undertake work for any partnership, company or organisation in which any Partner/Director/Principal has a financial interest or holds a position whereby they are able to make major policy decisions on behalf of such partnership, company or organisation?**

YES	NO
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If YES, please provide details (including any fees earned):

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**15. Does the Firm undertake any contract or work which involves the Firm and/or it's sub-contractors in:**

**a) boat/ship building, repair or maintenance or any form of manufacture, construction, erection or installation ?**

YES	NO
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If YES, please give full details and the amount of fees as declared relative to such contracts or work:

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**b) the supply of materials, plant, goods or equipment?**

YES	NO
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If YES, please give full details and the amount of fees as declared relative to such contracts:

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**16. Does the Firm use any brochure, written agreements or conditions of contract?**

YES	NO
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If YES, please attach copies of the relevant documents

If NO, state by what means the Firm is engaged:

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**17. Is any work undertaken for the design of a vessel as a prototype/model for the production of a class series**

YES	NO
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If YES, please state:

- a) The class of vessel \_\_\_\_\_
- b) Date of production of the first vessel in the series \_\_\_\_\_
- c) Approximate value of the standard vessel \_\_\_\_\_
- d) Approximate number of vessels produced to date in the series \_\_\_\_\_
- e) Countries of original distribution \_\_\_\_\_

**18a. Has the Firm undertaken work overseas (excluding the Channel Islands and the Isle of Man)**

YES	NO
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If YES, please give details:

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Gross Fees Country	Year:	Year:	Year:	Year:	Year:
USA/Canada					
Europe					
South America					
Australia/New Zealand					
Elsewhere					

**b) Is any work undertaken by the Firm for British Companies with American subsidiaries, or with assets in the USA based companies outside the USA**

YES	NO
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If YES, please give full details:

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**19a. This space may be used to provide additional information in answer to any Questions or statements:**

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**b. A full CV for each Partner, Principal or Director must accompany this Proposal.**  
**DECLARATION**

I/We declare and warrant that all the statements and particulars here given are true and that no information whatever has been withheld which might tend in any way to increase the risk of the Company or influence the acceptance of this proposal and should the above particulars alter in any way I/We will advise the Company immediately. I/We understand that failure to disclose any material facts which would be likely to influence the acceptance and assessment of the Proposal may result in the Company refusing to provide indemnity or voiding the policy in every respect. I/We hereby agree that this Declaration shall be the basis of the contract between me/us and the Company upon acceptance by me/us of the Quotation afforded by the Company.

Name of Proposer(s)  Date:

Signed by a   
Partner(s)/Director(s)/Principal(s)

**WE CAN PROVIDE A QUICKER QUOTATION SERVICE IF THE FOLLOWING INFORMATION IS ALSO PROVIDED:**

- **FULLY COMPLETED PROPOSAL FORM**
- **CV'S OF ALL DIRECTORS**
- **STANDARD TRADING TERMS AND CONDITIONS**
- **SAMPLE SURVEY (IF APPROPRIATE)**
- **PROMOTION OR CORPORATE LITERATURE**