

Note: Please download this form to your computer, complete on screen, save and then email to piteam@obf.ie or alternatively you can post or fax it to our team using the details below.

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MARKETING & MEDIA - PROFESSIONAL INDEMNITY PROPOSAL FORM

Please Note:

- This is a proposal form for a policy relating to claims made against the Insured during the period of the policy only – CLAIMS MADE.
- Please answer all the questions giving full and complete answers. Please use a separate sheet of paper if insufficient space. If necessary please write additional relevant facts on a separate sheet of paper.
- The proposal form must be completed and signed & dated by a person who is of legal capacity and have the authorisation to request this insurance for the Proposer.
- This form does not bind the Proposer but will form part of the Insurance contract if taken up.
- All material facts must be disclosed, as failure to do so may render any policy or certificate voidable, or severely prejudice your rights in the event of any claim. A material fact is one likely to influence acceptance or assessment of the proposal by Underwriters. If you are in doubt as to what constitutes a material fact, you should consult your broker.

Please supply the following additional information:

- Company Brochure
- CV's of Principals
- Copy of Standard Contract Terms and Conditions (if applicable)

1 Please provide the following details:

Name of practice:	
Address:	
Telephone:	
E-mail:	
Web site address:	
Practice establishment date:	

2 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.

3 Please state total numbers of:

Creative Staff		Other Technical Staff	
Administrative Staff		Other	

4 Do you use independent sub-contractors?

YES NO

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?

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

YES NO

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

YES NO

If YES, please provide full details:

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6 Please give details of the five largest contracts commenced in the past three years:

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

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

7 Please state:

(a) Please provide the details of your gross fees:

	Previous Year/...../.....	Current Year/...../.....	Estimated Year/...../.....
Gross Fee			
Maximum Fee			
Average Fee			

b) Financial Year End:

c) Please provide a percentage split of your income by geographical area:

	% of Gross Fees
Domestic Contracts	
Overseas Contracts (excluding USA/Canada)	
USA/Canada (Subject to non USA/Canada Law)	
USA/Canada (Subject to USA/Canada Law)	

d) If overseas work is carried out, please list the countries in which services are performed:

e) Please provide a split of activities in the previous financial year or next year estimate if a new business:

Commercial TV	%
Production of advertisements	%
Media spend (whether purchased by you or by a media independent relative to your creative work)	%
Other Media	%
Production of advertisements	%
Media spend (whether purchased by you or by a media independent relative to your creative work)	%
Printed Literature / Documents	%
Direct Marketing	%
Mailshots	%
Postage costs	%

Telemarketing	%
Database management and list broking	%
Sales Promotion	%
Marketing (including all market research)	%
Public Relations	%
Human Resources	%
Specialist Design (Graphic Design)	%
Specialist Design (Corporate Identity)	%
Other work (details please)	%
TOTAL:	100%

f) What is your largest mailing (by number of pieces mailed)?

g) What is your average size mailing?

h) Do you do 100% mailings? YES NO

If YES, please give details:

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8 Please answer:

a) 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

- Are all deviations to the above specification contract reported? YES NO

- Do you always use a purchase order, or equivalent, when employing subcontractors which mirrors any client obligations for each contract? YES NO

- 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 terms of contracts before committing them?

YES NO

If NO, please provide details

c) Does the above split accurately reflect:

- Your business activities in the past? YES NO

- Your estimated 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:

9 Please provide details of your current insurance:

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

For what limit/s of indemnity are quotations required?

10 Please provide the claims/circumstances information:

- (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) Have you suffered any loss from the dishonesty or malice of any partner, director, employee or self-employed freelancer? YES NO

- d) 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:

Data Protection:

The firm is a Data Controller as defined in the Data Protection Acts 1988 and 2003. We collect your personal details in order to provide business services to you. These details can be stored electronically or on paper for the purpose of arranging transactions on your behalf. We take great care with the information you provide to us, taking steps to keep it secure and ensure it is used only for legitimate purposes.

To provide you with services, we sometimes have to share your information including claims history with other relevant professionals (insurance companies, reinsurers, underwriters, claims handlers etc.) In assessing any claims made, insurers may undertake checks against publicly available information such as electoral roll, court judgments, bankruptcy and repossessions. We may also be obliged to share information with regulatory or statutory bodies.

You have the right at any time to request a copy of any “personal data” within the meaning of the above Data Protection Acts which the firm holds about you (a fee of €6.35 may be charged) and to have any inaccuracies corrected.

Declaration:

The undersigned authorised Officer of the Company declares that the statement and particulars in this Proposal form are true and that no material facts have been misstated or suppressed after enquiry. The undersigned agrees that should any of the information alter between the date of this Proposal and inception date of the insurance to which this proposal relates, they will give immediate notice thereof. The undersigned agrees that this Proposal, together with any other information supplied by us shall form the basis of any contract of insurance effected thereon.

Signature:..... (Signature not required for initial quote)

Name:.....

Position.....

Date.....

**OBF Insurance Group Ltd. is regulated by the Central Bank of Ireland
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