

## Trustees Indemnity - Quotation Form

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### The Insured

Name of Insured:

Address:

Post code:

County:

Contact Name:

Telephone:

Email:

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### Description of Service, Activities and Advice Provided

*Please use this space to fully describe your business and everything involved in your job*

**Email: [enquiries@bhibaffinities.co.uk](mailto:enquiries@bhibaffinities.co.uk) Telephone: 0330 013 0036**

**Brokerbilty Limited is registered in England and Wales number: 05074716  
Registered Office: AGM House, Barton Close, Grove Park, Enderby, Leicester, LE19 1SJ  
Authorised and regulated by the Financial Conduct Authority**

Risk Information

Charity Gross Income – last 12 Months

Limit of Indemnity required -

£100,000

£250,000

£500,000

£1,000,000

£2,000,000

Please confirm that;

There have been no major changes to the charity, its legal status and structure, its activities or the services that it provides since inception/last renewal, and that no such major changes are expected in the next 12 months?

Yes

No

The accounts are audited or ‘independently examined’ and they do not show the client to be insolvent and nor are there any unexplained levels of debt?

Yes

No

Auditors have qualified your annual accounts?

Yes

No

You are not currently insured with RSA?

Yes

No

You are registered as a charity or treated as a charity for tax purposes? Do you provide immigration advice

Yes

No

above level 1?

Do you provide any services for companies or persons represented in the USA, or its territories, or Canada?

Yes

No

Has any Insurer in respect of Professional Indemnity Insurance ever declined a proposal, refused renewal, terminated insurance or imposed special conditions?

Yes

No

Do you After Enquiry know of any circumstances, which might give rise to a claim against the organisation or any of its directors, committee members or employees in relation to the cover being applied for?

Yes

No

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Do you After Enquiry know of any circumstances, which might influence the Insurer's acceptance of this application?

Yes

No

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General Questions

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Do you wish to pay the premium by instalments?

Yes

No

Please confirm that;

No principal, partner or director of the organisation has been convicted of any criminal offence other than a motoring offence?

Yes

No

You are registered in the United Kingdom, Isle of Man or Channel Islands?

Yes

No

No principal, partner or director of the organisation has been subject to any county court judgements?

Yes

No

No principal, partner or director of the organisation been declared bankrupt or disqualified from being a company director or involved in any company that went into receivership or liquidation?

Yes

No

No principal, partner or director of the organisation has been subject to a recovery action by Customs & Excise or the Inland Revenue?

Yes

No

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*Please use the space below as room for spare notes and anything you want to make us aware of*

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Claims Information

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*Please detail any claims or losses in the past 3 years, whether insured or not*

Date of Loss	Loss Details	Amount Paid	Amount Outstanding

**End of quotation document**  
**Thank you for taking the time to fill in this form**

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