



PROFESSIONAL INDEMNITY INSURANCE PROPOSAL INFORMATION CHECKLIST

Welcome to Certicover Insurance an agent on behalf of certain underwriters at Lloyds. To make it easier and less time consuming before you get started with your application for Professional Indemnity Insurance it is suggested you have the following types of information and documentation ready to input and upload. Much of this information should be readily available as part of your statutory requirements and registration with the NSW Department of Fair Trading.

CONTRIBUTION FACTORS

- Professional Fee income for current, previous and next financial years

CERTIFICATION

- Details & breakdown of consulting work, nature of professional services and types of buildings certified
- Number of registered certifiers by accreditation categories and number non-accredited staff
- Number & type of Certificates issued in a year & split by building classification

BACKGROUND

- Past/proposed changes to your practice professional services/entity
- Details of any disciplinary action/fines imposed or past/pending inquiry
- Details of all major projects/fee income and any key developer/builder customers

CLAIMS, CIRCUMSTANCES AND EXTERNAL CLADDING

- Full particulars of past/present claims, events, circumstances of potential claims
- Copy of past/existing insurer claims history reports
- Full particulars of projects involving defective external cladding worked on BUSINESS PRACTICES
- Copy of standard written terms of engagement agreement
- Copy of all contracts entered into where you have excluded proportionate liability, or provided a hold harmless indemnity or waived your rights of recovery
- Sound knowledge of your business practices, internal controls, IT systems and records
- Registration details of all sub-contractors and external consultants engaged

GENERAL INFORMATION

- Company registration details of Practice entity/branches, ABN and registration/personal details of all certifiers/professionals seeking professional indemnity protection
- Names and details of each registered certifier under your business
- Full description of professional services required to be covered
- Particulars of existing and past professional indemnity cover over 10 years including limits of protection, excess levels, reinstatements, special endorsements, existing and renewal T&C's

PROTECTION COVERAGE

- Required optional extensions to the professional indemnity protection or special endorsements