

**Enterprise Insurance Services (Swansea) Limited**  
**Annual Proposal Form**  
**Your Level 3 & Level 4 Commercial Energy Assessors Insurance**

Insured Persons Name:	
Company Name:	
Address:	
Postcode:	
Telephone No:	
Fax:	
Email:	

Date of qualification as a Certificated Level 3 Commercial Energy Inspector:	
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Date of qualification as a Certificated Level 4 Commercial Energy Inspector (if applicable):	
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Date of qualification as a Certificated Public Building Display Certificate Assessor (if applicable):	
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Estimated number of Energy Performance Certificates Undertaken in the next 12 months:	
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Name of accreditation company:	
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**Please tick your selected covers**

**Level 3 Energy Assessors Only (including Public Building Display Certificates and Advisory Reports)**

Professional Indemnity Limit of Indemnity	Public Liability Limit of Indemnity	Annual Premium (Including 5% Insurance Premium Tax)	Tick required option below
£500,000 Any One Claim	£5,000,000 Any One Claim	£315.00	
£1,000,000 Any One Claim	£5,000,000 Any One Claim	£341.25	
£2,000,000 Any One Claim	£5,000,000 Any One Claim	£367.05	
Increased Public Liability Limit of Indemnity to £10,000,000 Any One Claim (Additional Premium)		£65.00	

**Level 4 Energy Assessors (including Level 3 and Public Building Display Certificates and Advisory Reports)**

Professional Indemnity Limit of Indemnity	Public Liability Limit of Indemnity	Annual Premium (Including 5% Insurance Premium Tax)	Tick required option below
£500,000 Any One Claim	£5,000,000 Any One Claim	£420.00	
£1,000,000 Any One Claim	£5,000,000 Any One Claim	£446.25	
£2,000,000 Any One Claim	£5,000,000 Any One Claim	£472.50	
Increased Public Liability Limit of Indemnity to £10,000,000 Any One Claim (Additional Premium)		£65.00	

## **GENERAL DETAILS**

During the last five years, have any claims (successful or otherwise) been made against you or are you aware of any circumstances which may give rise to a claim against you?	Yes / No
Have you ever been involved in any instances of fraud or dishonesty or been the subject of a criminal prosecution other than offences under the Road Traffic Act?	Yes / No
Have you ever been the subject of any County Court Judgements or Sheriff Court Decrees?	Yes / No
Have you ever been declared bankrupt or insolvent or been disqualified from being a company director or been involved as owner, director or partner with any company which went into receivership, administration or liquidation?	Yes / No
Have you ever been refused insurance or has any such insurance ever been cancelled or special conditions applied, other than standard market increases in premium?	Yes / No
<b>If , YES to any of the above please provide details</b>	

## **BANK DETAILS**

Should you wish to make payment of your premium by Direct Debit Please provide your bank details below in order that we can arrange for the appropriate document to be completed and sent to yourself.

<b>Bank Name</b>	
<b>Full Bank Address</b>	
<b>Name of Account to be Debited</b>	
<b>Sort Code</b>	
<b>Account Number</b>	

## **DECLARATION**

### **Material Facts**

All material facts must be disclosed. Failure to do so could invalidate the policy. A material fact is one which is likely to influence an insurer in the acceptance and assessment of the risk presentation. If you are in any doubt as to whether a fact is material then it should be disclosed to the insurer. If any changes in circumstances arise during the period of insurance cover please provide your insurer with details.

A specimen copy of the policy wording is available on request. We recommend you keep a record (including copies of letters) of all information provided to the insurer for your future reference. A copy of the completed application form will be supplied on request within a period of three months after its completion.

### **Choice of Law**

The appropriate law as set out below will apply unless you and the insurer agree otherwise:

1. The law applying in that part of the UK, Channel Islands or Isle of Man in which you normally live or (if applicable) the first named policyholder normally lives or
2. In the case of a business, the law applying to that part of the UK, Channel Islands or Isle of Man where it has its principal place of business or
3. Should neither of the above be applicable, the law of England and Wales will apply.

### **If You Have a Complaint**

We hope that you will be very happy with the service that we provide. However, if for any reason you are unhappy with it, we would like to hear from you. In the first instance, please write to:

Enterprise Insurance Services (Swansea) Limited, 22 Tawe Business Village, Phoenix Way, Swansea Enterprise Park, Llansamlet, Swansea, West Glamorgan SA7 9LA or telephone us on 01792 772778.

Enterprise Insurance Services Limited and Vision Underwriting Ltd are covered by the Financial Ombudsman Service. If you have complained to us and we have been unable to resolve your complaint, you may be entitled to refer it to this independent body. Following the complaints procedure does not affect your right to take legal action.

### **Telephone Call Recording**

For our joint protection telephone calls may be recorded and/or monitored

### **Data Protection Act**

For the purpose of the Data Protection Act 1998, the Data Controller in relation to any personal data you supply is Enterprise Insurance Services (Swansea) Limited and Vision Underwriting Ltd

### **Insurance Administration**

The insurer, its associated companies and agents, reinsurers and your intermediary, may use information you supply for the purposes of insurance administration. It may be disclosed to regulatory bodies for the purposes of monitoring and/or enforcing the insurers compliance with any regulatory rules/codes. Your information may also be used for offering renewal, research and statistical purposes and crime prevention. It may be transferred to any country including countries outside the European Economic Area for any of these purposes and for systems administration. In assessing any claims made, the insurer or its agents may undertake checks against publicly available information (such as electoral role, county court judgements, bankruptcy orders or repossessions). Information may also be shared with other insurers either directly or via those acting for the insurer (such as loss adjusters or investigators).

In the case of personal data, with limited expectations, and on payment of the appropriate fee, you have the right to access and if necessary rectify information held about you.

### **Credit Searches and Accounting**

In assessing your application the insurer may search files made available to do it by credit reference agencies who may keep a record of that search. The insurer may also pass to credit reference agencies information it holds about you and your payment record. Credit reference agencies may share information with other organizations, enabling applications for financial products to be assessed or to assist the tracing of debtors or to prevent fraud.

The insurer may ask the credit reference agencies to provide a credit scoring computation. Credit scoring uses a number of factors to work out risks involved in any application. A score is given to each factor and a total score obtained. Where automatic credit scoring computations are used by the insurer, acceptance or rejection of your application will not depend only on the result of the credit scoring process.

### **Sensitive Data**

In order to assess the terms of the insurance contract or administer claims that arise, the insurer may need to collect data that the Data Protection Act defines as sensitive (such as medical history or criminal convictions). By proceeding with this application you will signify your consent to such information being processed by the insurer or its agents.

### **Marketing**

Liberty Group and its agents may use your information to keep you informed by post, telephone, email or other means about products and services which may be of interest to you. Your information may also be disclosed and used for these purposes after your policy has lapsed. If you do not wish your information to be used for these purposes please write to **Vision Underwriting Ltd, Royal Mews, St Georges Place, Cheltenham, Gloucestershire GL50 3PQ.**

### **Fraud Prevention and Detection**

In order to prevent and detect fraud we may at any time:

- Share information about you with other organizations and public bodies including the police;
- Undertake credit searches and additional fraud searches;
- Check and/or file your details with fraud prevention agencies and databases, and if you give us false or inaccurate information and we suspect fraud, we will record this.

We can supply on request further details of the databases we access or contribute to by contracting insurance advisor.

We and other organizations may also search these agencies and databases to:

- Help make decisions about the provision and administration of insurance, credit and related services for you and members of your household;
- Trace debtors or beneficiaries, recover debt, prevent fraud and to manage your accounts or insurance policies;
- Check your identity to prevent money laundering, unless you furnish us with other satisfactory proof of identity.

**Claims History**

- Under the conditions of your policy you must tell us about any insurance related incidents (such as fire, water, damage, theft or an accident) whether or not they give rise to claim. When you tell us about an incident we will pass information relating to it to a database.
- We may search these databases when you apply for insurance, in the event of any incident or claim, or at time of renewal to validate your claims history or that of any other person or property likely to be involved in the policy or claim.

You should show these notices to anyone who has an interest in the insurance under the policy.

**Declaration**

I/We understand and the contents of the completed application and I/We declare that the information given is, to the best of my/our knowledge and belief correct and complete. I/We agree that the statements in the application shall form the basis of the contract between the insurer and myself/ourselves and if the risk is accepted I/We undertake to pay the premium when called upon to do so. I/We understand that my/our information may also be disclosed to regulatory bodies for the purposes of monitoring and/or enforcing the insurers compliance with any regulatory rules/codes.

Signed:

Date:

**Please complete and return to Alun Jones, Enterprise Insurance Services (Swansea) Limited, 22 Tawe Business Village, Swansea Enterprise Park, Swansea, SA7 9LA. Telephone No. 01792 772 778 Fax No. 01792 792 598 [www.homeenergyinspectorinsurance.co.uk](http://www.homeenergyinspectorinsurance.co.uk)**

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