



The purpose of this application form is for us to find out more about you. You must provide us with all information which may be material to the cover you wish to purchase and which may influence our decision whether to insure you, what cover we offer you or the premium we charge you.

How to complete this form

The individual who completes this application form should be a senior member of staff at the company and should ensure that they have checked with other senior managers and colleagues responsible for arranging the insurance that the questions are answered accurately and as completely as possible. Once completed, please return this form to your insurance broker.

Section 1: Company Details

1.1 Please state the name and address of the principal company for whom this insurance is required. Cover is also provided for the subsidiaries of the principal company, but only if you include the data from all of these subsidiaries in your answers to all of the questions in this form:

Company name: _____

Primary Address (Address, State, ZIP, Country): _____

Website Address: _____

1.2 Date the business was established (MM/DD/YYYY): _____

1.3 Please state the number of employees:

Professional: _____ Construction: _____

1.4 How many principals / directors / officers / partners are there in the company? _____

a) Please show the details of all principals / partners / directors:

| Name | Years in position | Years experience | Qualifications |
|-------|-------------------|------------------|----------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

1.5 Date of financial year end (MM/DD/YYYY): _____

1.6 Please state your gross revenue in respect of the following years:

| | Last complete FY | Estimate for current FY | Estimate for current FY |
|--|------------------|-------------------------|-------------------------|
| Gross domestic revenues including construction values: | \$ _____ | \$ _____ | \$ _____ |
| Professional fees: | \$ _____ | \$ _____ | \$ _____ |
| Other territory revenue: | \$ _____ | \$ _____ | \$ _____ |
| Total revenue: | \$ _____ | \$ _____ | \$ _____ |

1.7 Please state your percentage of total revenue attributable to:

| | Last complete FY | Estimate for current FY | Estimate for current FY |
|--|------------------|-------------------------|-------------------------|
| a) Construction only | % | % | % |
| b) Construction with in-house design | % | % | % |
| c) Construction with sub-contracted design | % | % | % |
| d) Construction management "agency" | % | % | % |
| e) Construction management "at risk" | % | % | % |
| f) Other | % | % | % |

**Design means any design or specification, feasibility study, technical information calculation or survey carried out in relation to a contract.*

1.8 Please provide details for the primary contact for this insurance policy:

| | |
|----------------|-------------------|
| Contact Name: | Position: |
| Email address: | Telephone number: |

Section 2: Activities

2.1 Is the insured a:

| | | |
|--------------------------|-----|----|
| a) General contractor: | Yes | No |
| b) Specialty contractor: | Yes | No |

If you have answered "yes" to a) or b) above please provide details:

2.2 Please provide a full breakdown of your professional services, if applicable, and whether it is performed in-house or sub-contracted:

| | In-house (%) | Sub-contracted (%) |
|--------------------------------|--------------|--------------------|
| Architectural: | | |
| Chemical engineering: | | |
| Civil engineering: | | |
| Electrical engineering: | | |
| Environmental engineering: | | |
| Geotechnical/soil engineering: | | |
| HVAC engineering: | | |
| Landscape architect: | | |
| Mechanical engineering: | | |
| Project/ construction manager: | | |
| Structural engineering: | | |

2.3 Please advise the percentage of your revenue received in the following areas of work

The total of all activities listed here should equal 100%.

| | | | |
|---------------------------|---|--------------------------------|---|
| Airports (post-board): | % | Industrial buildings: | % |
| Airports (pre-board): | % | Marine structures: | % |
| Amusement structures: | % | Mechanical plant: | % |
| Apartments: | % | Mines: | % |
| Basements: | % | Petrochemical/refineries: | % |
| Bridges: | % | Public buildings: | % |
| Building envelope: | % | Railways: | % |
| Bulk handling structures: | % | Roads/highways: | % |
| Cladding/siding: | % | Roofs: | % |
| Commercial buildings: | % | Swimming pools: | % |
| Condominiums: | % | Tunnels: | % |
| Dams: | % | Water/sewerage systems: | % |
| Domestic buildings: | % | Other (please provide details) | % |

2.4 Do you undertake any projects in the state of New York? Yes No

If "yes" what percentage of projects are undertaken in New York? %

2.5 Do you have any financial or ownership interest in any of the projects? Yes No

If you have answered "yes", please provide details:

Section 3: Contract & Risk Management Information

3.1 Please complete the following in respect of your three largest projects in the past three years:

| Name of client | Nature of work | Annual contract income | Duration | Project/ construction value |
|----------------|----------------|------------------------|----------|-----------------------------|
| | | | | |
| | | | | |
| | | | | |

3.2 a) Do you or any of your employees retain an ownership interest in any other entity? Yes No

| Owner name | Amount Ownership Interest | Entity Name | Relation to Insured | Nature of Activities | Entity's Gross Revenues in Past Year |
|------------|---------------------------|-------------|---------------------|----------------------|--------------------------------------|
| | | | | | |
| | | | | | |

b) Do you provide any professional services to any of the above entities? Yes No

c) Do you hire any of the above entities to provide services for it? Yes No

3.3 Approximately how many customers do you have?

3.4 Do you carry out work only under a written contract signed by every client? Yes No

Please provide a copy of your standard form of contract, or typical examples of contracts used.

If "no", please explain in what circumstances, and why:

3.5 Please describe how, if at all, you limit your liability for consequential loss or financial damages under a written contract:

3.6 Please describe your legal review process, if any, before entering into new contracts or agreements:

3.7 Do you employ subcontractors? Yes No

If "yes", please state:

a) the approximate percentage of your revenue, in your current financial year, that will be paid to subcontractors (%):

b) whether you sign reciprocal hold harmless agreements: Yes No

c) whether you ensure that contractors have their own errors and omissions and general liability insurance: Yes No

If you answered "yes" to c) above, what is the limit of liability that subcontractor must purchase? \$

Section 4: Pollution

4.1 Do you transport or dispose of any hazardous waste, chemicals or liquids? Yes No

If "yes", please provide full details

4.2 Do you perform any environmental contracting operations? Yes No

If 'yes', please provide full details

4.3 Do you have a mold mitigation plan? Yes No

4.4 Do you have a formal spill prevention, control and countermeasure plan? Yes No

4.5 Do you have a dedicated environmental officer? Yes No

Section 5: Insurance History

5.1 Please provide details of your current Errors and Omissions insurance, if applicable, and what you require for the next year of insurance:

| | Retroactive date (MM/YY) | Effective date (MM/YY) | Limit | Deductible | Premium | Insurer |
|-----------|--------------------------|------------------------|-------|------------|---------|---------|
| Current: | | | | | | |
| Required: | | | | | N/A | N/A |

5.2 Please tick whether you require quotes for any of the following covers:

Cyber and Privacy Liability

Section 6: Claims Experience

6.1 Please state whether you are aware of any incident:

- a) which may result in a claim under any of the insurance for which you are applying to purchase in this application form: Yes No
.....
- b) which resulted in legal action being made against any of the companies to be insured within the last 5 years: Yes No
.....
- c) cease and desist orders been made against you: Yes No
.....
- d) which resulted in a partner or director being found guilty of any criminal, dishonest or fraudulent activity or been investigated by any regulatory body: Yes No
.....

If you have answered "yes" to any of the above then please describe the incident, including the monetary amount of the potential claim or the monetary amount of any claim paid or reserved for payment by you or by an insurer. Please include all relevant dates, including a description of the status of any current claim which has been made but has not been settled or otherwise resolved.



Design & Construction Insurance application form



Important Notice

By signing this form you agree that the information provided is both accurate and complete and that you have made all reasonable attempts to ensure this is the case by asking the appropriate people within your business. CFC Underwriting will use this information solely for the purposes of providing insurance services and may share your data with third parties in order to do this. We may also use anonymized elements of your data for the analysis of industry trends and to provide benchmarking data. For full details on our privacy policy please visit www.cfcunderwriting.com/privacy

Contact name: Position:

Signature: _____ Date (MM/DD/YYYY): _____

Additional Information