



Supplementary Questionnaire

Questionnaire to be completed where survey/valuation is undertaken

Important Notes

“**You / Your**” refers to all firms to be insured under this arrangement including their **Principals**, including any predecessor or previous business for which cover is required.

“**We / Us / Our**” means the Insurer or Insurers subscribing to the insurance to be effected through Pen Underwriting Limited trading as Manchester Underwriting Management (“**MUM**”).

“**Firm**” means any business, whether a sole trader, partnership or company, limited liability or otherwise.

“**Principal/s**” means any director, partner, member or sole trader.

This form should be completed such that the information provided relates to all **Firms** to be insured under this arrangement, including any predecessor or previous business for which cover is required.

This questionnaire forms part of **Your** presentation to **Us**. **We** rely on the information **You** give to **Us** in deciding whether to offer insurance and in setting the terms and premium. **You** must take care when answering any questions **We** ask by ensuring that all information provided is accurate and complete. **You** must disclose every material circumstance **You** know or ought to know, and provide a fair presentation of the information required to enable **Us** to assess **Your** insurance risk. **You** must also disclose any changes to the facts disclosed that occur prior to commencement of insurance.

Failure to disclose all relevant material facts whilst making this application may lead to the invalidation of any insurance effected, and ultimately result in avoidance of the insurance or non-payment of any claim made.

Information is material if it could:

- affect **Our** assessment of the risk; or
- it could mean that **We** may need to change the terms or premium or both; or
- mean that **We** may not be able to cover that aspect of risk; or
- mean that **We** may no longer be able to provide **You** with insurance cover.

Full details of coverage provided can be found in MUM’s Policy Wordings and Summaries, which are available on request or at www.manchesterunderwriting.com.

How does MUM maintain Your privacy?

MUM is the data controller of any personal data **You** provide to **MUM**. **MUM** collects and processes personal data in order to offer and provide insurance services and policies and to process claims. Personal data is also used for business purposes such as fraud prevention and detection, financial management, to generate risk modelling, conduct analytics including to advise, improve and develop its products and services and to comply with its legal and regulatory obligations. This may involve sharing information with and obtaining information from **MUM**’s group companies and third parties such as (re)insurers, other brokers, loss adjusters, credit reference agencies, service providers, professional advisors, regulators or fraud prevention agencies.

MUM may record telephone calls to help it to monitor and improve the service provided as well as for regulatory purposes.

Please see **MUM**’s Privacy Notice for further information on how **Your** personal data is used, shared, disclosed and retained, **Your** rights in relation to **Your** personal data and how to contact **MUM**’s Data Protection Officer. **MUM**’s Privacy Notice can be found at <https://www.penunderwriting.co.uk/Privacy-Policy>. **MUM** may make



important updates to its Privacy Notice from time to time and these may in turn affect the way **MUM** uses and handles **Your** data. Please ensure **You** review **MUM's** Privacy Notice periodically to ensure **You** are aware of any changes.

If **You** are providing data in the course of **Your** business, or as a charity, for charitable purposes and providing information on other individuals to **MUM**, for example **Your** employees and/or any other party that would be covered under the insurance or services that **MUM** may provide to **You**, **You** shall ensure that individuals whose personal data **You** are providing to **MUM** have been provided with fair processing notices that are sufficient in scope and purpose, and that **You** have obtained all appropriate consents, where required, or are otherwise authorised, to transfer the personal data to **MUM** and enable **MUM** to use the personal data and process the personal data for the purposes of this agreement and as set forth in **MUM's** Privacy Notice. **You** must not share personal data with **MUM** that is not necessary for **MUM** to offer, provide or administer its services.

If insufficient space then please continue on a separate sheet.

Name of Your business:

1. Please state S&V fees:

	Current Year (estimate)	Last Year	Last Year -1	Last Year -2	Last Year -3
Total gross fees from Residential surveying & valuing	£	£	£	£	£
Total gross fees from Commercial surveying & valuing	£	£	£	£	£
Total gross fees for all work	£	£	£	£	£
Average total number of surveys / valuations per fee earner per week					

2. Work Radius

Mile radius from office	% of Surveys / Valuations
0-25 mile radius of office	%
25-50 mile radius	%
50+ mile radius	%



3. Breakdown of work in last year

Category	Residential		Commercial	
	Fees	No. reports	Fees	No. reports
Valuation for lending other than described below	%		%	
RICS Homebuyer Report or equivalent – with lending valuation	%		%	
RICS Homebuyer Report or equivalent – with non-lending valuation	%		%	
RICS Homebuyer Report or equivalent – with no valuation	%		%	
Further Advance valuations – for existing lender	%		%	
Re-mortgage valuations – for existing lender	%		%	
Asset Valuations for balance sheet purposes or probate/divorce	%		%	
Condition Surveys – with lending valuation	%		%	
Condition Surveys – with non-lending valuation	%		%	
Condition Surveys – with no valuation	%		%	
For property investment funds	%		%	
Other (please provide details below)	%		%	

--

4. Please state for the last seven years:

Residential Buy to Let valuations - Names of lenders for whom most work undertaken:	
Valuations in relation to Developers (whether new build or conversions) - Names of lenders for whom most work undertaken:	
Valuations in relation to sub-prime products - Names of lenders for whom most work undertaken:	
Other Residential valuations - Names of lenders for whom most work undertaken:	
Other Commercial valuations - Names of lenders for whom most work undertaken:	



5. Please state for the last seven years:

Type of Valuation	Largest Valuation	Average Valuation
Residential	£	£
In relation to Developers	£	£
Other Commercial	£	£
Portfolio Valuations	£	£

6. Please state for the last seven years (please add additional information in the box below, if necessary):

Have You been removed from or refused admission to any lenders' panel?	YES / NO
Minimum number of comparables obtained to support Your valuations:	
How long You hold comparables on file:	
Sources of comparables:	e.g. estate agent sold values, estate agent for sale values, land registry values etc. (please identify database used)
Have You always reinspected properties when asked to refresh a valuation or in connection with re-mortgages or further advances?	YES / NO
Have You at all times complied with the RICS Valuation Standards (Red Book)?	YES / NO
Have all valuations and surveys been undertaken by a "RICS Registered Valuer" under the RICS Valuer Registration Scheme?	YES / NO

--

7. Please state for the last seven years:

Have You undertaken any drive by, kerbside or desktop valuations?	YES / NO
If YES, in what circumstances have you undertaken this type of work?	
How did You control the increased risk?	



8. Please state for the last seven years:

Have You undertaken any surveys of care or nursing homes?	YES / NO
---	----------

9. Please state:

Have You at any time or do you intend to undertake any surveys or valuations other than of real estate and buildings?	YES / NO
Do You have any business relationship with or financial interest in any mortgage broker or solicitor?	YES / NO
Do You have a referral fee or shared commission arrangement with any other party?	YES / NO
Have You at any time carried out a valuation where You have a financial or family relationship with any party?	YES / NO
If YES to any of these questions, please provide full details:	

DECLARATION

I/we declare that, after full enquiry, the contents of this questionnaire are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this questionnaire, together with any other information supplied by me/us, shall form the basis of any contract of insurance which may be effected.

If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of insurance, I/we undertake to inform Underwriters.

I/we hereby consent to any information I/we have provided being processed by you for the purposes of providing insurance and claims handling, which may necessitate sharing such information with third parties.

Name of Principal signing this form:	
Signature of Principal:	
Date:	