

Quotation Request Form

Scheme details

Name of Scheme	<input type="text"/>		
Scheme reference number	<input type="text"/>		
Scheme contact name	<input type="text"/>		
Scheme contact address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Telephone number (inc. area code)	<input type="text"/>	Fax number (inc. area code)	<input type="text"/>

The Rowanmoor Property Insurance Policy offers comprehensive insurance to protect trustees from loss arising from a very wide range of potential risks including buildings, rent and property owners' liability. The Key Features document provides details of the standard and optional cover available.

This form is for use by trustees of a Rowanmoor Family Pension Trust, to request a quotation for property investments made prior to 1 October 2012, and for small self-administered scheme (SSAS) trustees to request a quotation for any property investment.

To receive a quotation, please complete this Quotation Request Form in full using BLOCK CAPITALS and dark ink, and return it to RCL Consultancy. The information supplied will be held in the strictest confidence and subject to the provisions of Data Protection Legislation.

The Rowanmoor Property Insurance Policy is administered by RCL Consultancy.

For assistance when completing this form or for further information regarding the Rowanmoor Property Insurance Policy please call 03445 440 747, or email consultancy.support@rclconsultancy.co.uk.

Quotation Request

Proposed policyholder(s) details

The policyholder(s) is/are the person/persons responsible for insuring the property and will usually be the scheme trustee(s), as the property owner(s).

Please complete this section to confirm the name(s) of the insured person(s) who will be named on the Policy.

Rowanmoor Trustees Limited will also be included as a party to the Policy.

Name(s) of proposed policyholder(s)

Property information

Please provide a description of the property for example, an office, factory or shop.

Address of property to be insured

	Postcode	

Description of property

--

Is the purchase for land only?

YES NO

Is the land fenced?

Fully Partially Not at all

Is the land free of obstacles?

YES NO

Does the land have a public right of way across the plot?

YES NO

Please tick the box to confirm a photograph is attached.

Photograph attached

Is there a mortgage attached to the property?

YES NO

If 'YES' please confirm the lender's name and address if interest is to be noted.

Lender's name

--

Lender's address

	Postcode	

Telephone number (inc. area code)

--

Fax number (inc. area code)

--

Is the property currently occupied?

YES NO

If 'NO' is the property being actively marketed to let?

YES NO

What security measures does the property have?

--

If the property is vacant, what is its intended use?

--

If the property is vacant, when is it anticipated the property will be re-let?

D	D	M	M	Y	Y
---	---	---	---	---	---

If the property is occupied, please confirm the name of the tenant.

--

What is the nature of the tenant's business(es)?

--

Property information (continued)

Please confirm the construction details of the property.

Floor construction Concrete Timber Steel
 Other (please indicate)

Roof construction Concrete Pitched tile Flat felt
 Other (please indicate)

Wall construction Brick Concrete Part brick/block
 Corrugated metal Corrugated asbestos Part brick/tile
 Other (please indicate)

Frame construction Steel Concrete Part brick/block
 Brick
 Other (please indicate)

What is the age of the property?

Is the property listed? YES NO UNKNOWN
 If 'YES' what is the grade of listing? Grade 1 Grade 2

Has the property ever suffered as a result of flood, subsidence, landslip or heave?
 YES NO UNKNOWN

Is the property built on made up ground?
 YES NO UNKNOWN

How many storeys does the property have?

Does the property have an Atrium? YES NO UNKNOWN
 Are sprinklers installed and operational? YES NO UNKNOWN
 Are there any cooking facilities? YES NO UNKNOWN
 If 'YES', please provide details of the facilities.

Is an automatic sprinkler system installed and maintained in accordance with The Loss Prevention Council Rules for Automatic Sprinkler Installations 29th Edition?

Is the cooking and extraction equipment regularly inspected and maintained by a competent person or firm?

If 'YES', is the cooking and extraction equipment maintained?
 YES NO UNKNOWN

Are there any composite panels?
 YES NO UNKNOWN
 If 'YES', where are they located and are they LPCB (Loss Prevention Certification Board) approved?

Please provide details of any trees located on or near the property.

Please ensure this box is completed by entering 'NONE', 'NO KNOWN CLAIMS' or full details of any claim made.

Please provide details of any claims or losses which have affected the property during the last 5 years.

Please confirm the name of the existing or previous insurer if known.

Please confirm building insurance premiums paid for the last 5 years if known.

D	D	M	M	Y	Y	£	<input type="text"/>
D	D	M	M	Y	Y	£	<input type="text"/>
D	D	M	M	Y	Y	£	<input type="text"/>
D	D	M	M	Y	Y	£	<input type="text"/>
D	D	M	M	Y	Y	£	<input type="text"/>

Details of cover required

This is the amount of rent set in the lease.

This is the rent period that the rent sum assured represents.

This will usually only be applicable if there are communal areas within the building and is usually covered within the lease. However, if the service charge is agreed outside of the lease please confirm the amount of the sum assured required.

This is the contents of the building's communal areas, including for example, furniture, carpets and building management and security systems.

The policy provides a standard cover limit of £5 million. Please confirm the amount if you wish to increase this limit for an additional cost.

Please note that the policy is renewed annually on 1 May each year. Therefore, if establishing the policy mid-year the initial premium will be calculated on a pro rata basis. More details can be found in the Key Features document.

Building reinstatement value?

Current annual rent

Rent indemnity period months

Service charge sum assured? (if applicable)

Service charge indemnity period months

Content sum assured? (if applicable)

Property owners' liability limit of indemnity.

Please confirm the date the cover is to commence

Optional cover

Please tick the boxes to indicate if you require the optional cover shown opposite for an additional cost.

Terrorism insurance YES NO

Employer's liability YES NO

Additional insurances

As an additional service, Lockton Companies LLP is able to offer engineering insurance and engineering inspection on lifts and boilers separate to this policy. Please tick to confirm if you would like a quotation on either of these insurances for an additional cost and provide details of any plant and machinery you would like insured.

Engineering inspection YES NO

Engineering insurance YES NO

Details of plant/machinery to be insured

Declaration

Please note that, under the Insurance Act 2015, it is your duty to disclose any information that might influence the insurers/reinsurers in fixing the premium or determining whether to accept the risk, for example, the presence of Japanese knotweed, a Green Deal Loan, solar panels and receipt of an enforcement notice from a statutory body. Please provide as much information as possible. If the information is unknown then please state Unknown.

Other information:

Signed for and on behalf of the proposed policyholder(s).

I confirm that the above information is, to the best of my knowledge, true and complete and no material details have been omitted.

Signature

Print name

Date

D	D	M	M	Y	Y
---	---	---	---	---	---

 03445 440 440

 03445 440 500

 enquiries@rowanmoor.co.uk

 rowanmoor.co.uk

Rowanmoor Executive Pensions Limited (No. 5792242), Rowanmoor Personal Pensions Limited (No. 2268900) and Rowanmoor Trustees Limited (No. 1846413) are registered in England at Rowanmoor House, 46-50 Castle Street, Salisbury SP1 3TS. Rowanmoor is a trading name of the Embark Group. Rowanmoor Personal Pensions Limited is authorised and regulated by the Financial Conduct Authority.

RCL Consultancy is a trading name of Rowanmoor Consultancy Limited (No. 3445656). Registered in England at Rowanmoor House, 46-50 Castle Street, Salisbury SP1 3TS. Authorised and regulated by the Financial Conduct Authority. Part of the Embark Group..

If you require this document in audio, large print or Braille format, please telephone 03445 440 550 or fax 03445 440 500.