



ARTISAN[®]
UNDERWRITING



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REAL ESTATE AGENTS PI ADDENDUM

Note: Revenue must include joint ventures and fees attributable to sub-contractors and sub-consultants.

1. Please provide gross Fees/Turnover, including gross fees paid to sub-contractors.

Location	Previous 12 months	Last 12 months	Next 12 months
Australia	\$	\$	\$
Other (exc USA/Canada)	\$	\$	\$
USA/Canada	\$	\$	\$
Total	\$	\$	\$

2. Please provide us the 3 largest Client Contracts in the last years (including current).

Client name	Start Date	Completion Date
1.		
2.		
3.		

3. Please provide an approximate percentage allocation of the Insureds income for each of the below

	Last Financial Year	Next Financial Year
Residential Sales (existing)		
Residential Sales (off the plan – not house & land packages)		
Residential Sales (off the plan – house & land packages)		
Commercial Sales (existing)		
Commercial Sales (off the plan)		
Residential Property Management		
Resident Unit Manager		
Commercial Property Management (not shopping centres)		
Shopping Centres Property Management		
Business Broking		
Mortgage Broking		

Mortgage Originator (i.e. delegated authority from a lending Institution)		
Valuations		
Auctioneering		
Insurance		

4. If the Insured provides (or has provided) Business Broking Activities, please provide the following

a) What types of businesses do you handle?	
b) What is the maximum value any one business sold over previous 3 years?	
c) How many businesses have you sold in the last 12 months?	
d) What was the average sale price for businesses sold in the past 12 months?	
e) Do you always advise the purchaser to seek independent legal and financial advice?	No <input type="checkbox"/> Yes <input type="checkbox"/>

5. If you act or provide services as a Strata Manager or Resident Unit Manager, please provide the following;

Number of Units	
Units in Letting Pool	
Number of Commercial Leases	
Types of Commercial Leases	
Please list all facilities at the complex	

6. If you provide Property Management (including Strata Management or Resident Unit Management) please provide the following

(i) Do you use the standard Property Management and/or Strata Title Management agreements as recommended by the Real Estate Institutes? No Yes

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(ii) Do you maintain a Complaints/Repairs Register to record all reports it receives about problems with the properties the Insured is managing? No Yes

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(iii) Prior to leasing a property (or renewing a property lease), does the Insured complete a property inspection report and insist the landlord fixes all potential issues raised in the report prior to the tenant moving in (or the lease being re-signed)? No Yes

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7. Are written disclaimers always included with advice being given?

No Yes

8. Are written disclaimers or hold harmless agreements executed with any third Parties?

No Yes

9. Has the Insured or any of its subsidiaries undertaken any mergers or acquisitions in the last five years?

No Yes If Yes, please provide details:

10. Has the Insured or any of its subsidiaries been involved in any joint ventures in the last five years?

No Yes If Yes, please provide details:



DECLARATION

Please Note: Signing the Declaration does not bind either the proposed Insured or the Insurer to execute this or any insurance whatsoever.

Signed	
Name of Partner(s) or Director (s)	
On behalf of	
Date	/ /



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