



Household and Property Owners Quotation Fact Finder

PLEASE COMPLETE ALL SECTIONS

Date: _____ Service Inspector: _____ Date Quote Required For: _____
Quote Details to Be Sent to Service Inspector / Client _____

CLIENT DETAILS

Mr/Mrs/Miss/Ms: _____ First Name: _____ Surname: _____
DOB: _____ Marital Status: Married/Partner/Single/Civil/Widowed: _____
Occupation: _____ Employers Business: _____ Full or Part time: _____

PROPERTY DETAILS

Postcode: _____ House Name/Number: _____
Number of Occupants: _____ Any under 18?: _____
Detached/ Semi/ End-Terr/ Mid Terr/ Other Please specify: _____
Walls: Brick/ Stone/ Timber/ Concrete/ Other _____
Roof: Tiled/ Slate/ Thatched/ Other _____ Is Roof Flat? Yes / No _____ Felt Roof Yes / No _____
Bedrooms: 1 / 2 / 3 / 4 / 5 _____ Flat floor no: _____ Listed Yes/No: _____
Ownership/Use: Mortgaged/ Owned / Rented Private/ Council: _____
If Let is it: Professional/ DSS / Student / Unoccupied: _____
Mortgage Company Details: _____ First Time Buyer? Yes/No: _____
Year Built? _____ Holiday Home: Yes/No: _____

SECURITY DETAILS

Apprv Locks on Final Exit Doors: Yes/No: _____ Neighbourhood Watch Member: Yes/No: _____
Key Operated Window Locks: Yes/No: _____ Occupied Regularly During Day: Yes/No: _____
Apprv Locks on Other External Doors: Yes/No: _____ Occupied Regularly During Night: Yes/No: _____
French or Double Door Apprv Locks: Yes/No: _____ Smoke Detectors: Yes/No: _____
Sliding / Patio Doors Apprv Locks: Yes/No: _____ Burglar Alarm: Yes/No: _____
Nacoss Approved: Yes/No: _____

Building Sum Insured? _____ Cover: Standard / Accidental / Not Required _____

Current Insurer Details? _____ NCB Years: _____ Contents Sum Insured? _____

Cover: Standard / Accidental / Not Required _____ Voluntary Excess: _____

Current Insurer Details? _____ NCB Years: _____ Date cover is required _____

ALL RISK COVER & EXTRA COVERS

Unspecified Personal Possessions Required? Yes / No £ _____

Specified Items:

1. _____ £ _____ 2. _____ £ _____

3. _____ £ _____ 4. _____ £ _____

5. _____ £ _____ 6. _____ £ _____

Pedal Cycle Yes /No _____ Make: _____ Model: _____ Value: _____

Money Yes/No: £ _____ Credit cards Yes/No: £ _____

Freezer Cover Yes/No: £ _____ Legal Cover Yes/No: £ _____

UNDERWRITING QUESTIONS

Storm: Yes/No: _____ Flooding: Yes/No: _____

Subsidence: Yes/No: _____ Landslip: Yes/No: _____

In good repair: Yes/No: _____ Repaired or Monitored? Yes/No: _____

Underpinned: Yes/No: _____ Any Trees nearby? Yes/No: _____

Smokers: Yes/No: _____ Any Business Use? Yes/No: _____

Policy Cancelled/ Refused / Terms: Yes/No _____ Any Other Material Facts? Yes/No: _____

CLAIMS HISTORY IN LAST 5 YEARS:

1. _____ Value £ _____

2. _____ Value £ _____

3. _____ Value £ _____

ANY OTHER ADDED INFORMATION If answered Yes to the Underwriting Questions provide Details here:



Data Protection and Client Consent

The information you have provided is subject to the Data Protection Act 1998 (the "Act"). By signing this document you consent to us or any company associated with us processing, both manually and by electronic means, your personal data for the purposes of providing advice, administration and management.

"Processing" includes obtaining, recording or holding information or data, transferring it to other companies associated with us, product providers, the FSA or any other statutory, governmental or regulatory body for legitimate purposes including, where relevant, to solicitors and/or other debt collection agencies for debt collection purposes and carrying out operations on the information or data.

We may also contact you or pass your details to other companies associated with us to contact you (including by telephone) with details of any other similar products, promotions, or for related marketing purposes in which we think you may be interested.

The information provided may also contain sensitive personal data for the purposes of the Act, being information as to your physical or mental health or condition; the commission or alleged commission of any offence by you; any proceedings for an offence committed or alleged to have been committed by you, including the outcome or sentence in such proceedings; your political opinions, religious or similar beliefs, sexual life; or your membership of a Trade Union.

Please tick this box to confirm your consent to us or any company associated with us processing any such sensitive personal data.

If you are happy for us or any company associated with us to contact you for marketing purposes by e-mail, telephone, post or SMS, please tick this box.

If at any time you wish us or any company associated with us to cease processing your personal data or sensitive personal data, or contacting you for marketing purposes, please contact:

The Data Protection Officer on **0114 261 2020** or in writing at **Joseph W Burley & Partners (UK) Ltd, 5-8 Jessops Riverside, Brightside Lane, Sheffield, S9 2RX.**

You may be assured that we and any company associated with us will treat all personal data and sensitive personal data as confidential and will not process it other than for a legitimate purposes. Steps will be taken to ensure that the information is accurate, kept up to date and not kept for longer than is necessary. Measures will also be taken to safeguard against unauthorised or unlawful processing and accidental loss or destruction or damage to the data.

Subject to certain exceptions, you are entitled to have access to your personal and sensitive personal data held by us. You may be charged a fee (subject to the statutory maximum) for supplying you with such data.

Signature _____ Date _____