



PROFESSIONAL INDEMNITY INSURANCE PROPOSAL FORM

Thank you for taking time to fill in this form. Fidelity Shield Insurance Company Limited is committed to processing your personal information according to the provisions of the Data Protection Act, 2019. Please take time to carefully read the Privacy Notice attached at the end of this form before filling in your details for more details about how we collect, use and safeguard your personal information.

Agency _____ Policy No _____

Proposer's Name (in full): _____

Address of all Offices: _____

Profession: _____ Date established ____ / ____ / ____

1. Full name of each Partner, qualifications and when qualified, how long practicing as a Partner in the Firm, and Name(s) of Firm(s) in which he previously practiced.

Name	Qualifications	When Qualified	How long practicing as a Partner in the Firm	Previous Firm(s)

2. Total numbers of Partners and Staff Partners

- a) Partners _____
- b) Staff other than Typists, Telephonists and Messengers _____
- c) Typists, Telephonists, Messengers _____

3. a) Total number of professionally qualified employees _____

b) Total salaries per annum Kshs. _____

4. When was the Firm established ____ / ____ / ____

5. Total indemnity required (inclusive of any extensions)

- a) Per any one event _____
- b) In the aggregate during period of insurance _____

6. What was the Gross Fee Income

- a) In the last 12 months _____
- b) In the 12 months before that _____

7. Are you prepared to bear an excess each and every claim equal to:

- a) 2.5 per cent _____
- b) 5 per cent of the amount indemnity _____



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EXTENSIONS

8. If available, do the Firm require-

Extension 1 –Libel and Slander (Limited to 10% of Policy Limit of Indemnity) Yes [] No []

Extension 2 – Partners’ Previous Business

- a) Incoming Partners Yes [] No []
b) Outgoing Partners Yes [] No []

Extension 3 – Amendment of Dishonesty Exclusion 3. Yes [] No []

Extension 4-Loss of Documents (Limited to 10% of Policy Limit of Indemnity) Yes [] No []

9. If Extension 2(b) (Outgoing Partners) is required, please give:

- a) Full Names of the former Partners to whom it is to apply _____ and
b) Dates when they ceased to be Partners in the Firm ____/____/____

10. Is the Firm at present or has it in the past insured for professional liability risks? If “yes” please state

Yes [] No [] _____

11.Has any application for insurance of this nature made on behalf of the Firm or their predecessors in business or any of the present Partners ever been cancelled or renewal refused or have special terms been imposed?

If so, please give full particulars. Yes [] No []

12. Have any claims ever been made against the firm or their predecessors in business or any of the present or former Partners? If so, please give full particulars. Yes [] No []

13. Are any of the Partners aware of any circumstance which is likely to give rise to a claim against the Firm or their predecessors in business or any of the present or former Partners? If so, please give full particulars.

Yes [] No [] _____

14. Period of insurance from ____/____/____ To ____/____/____ (both dates inclusive)

I/We hereby declare that the whole of the foregoing Statement is true and complete in every respect and that I/We have not concealed any material fact that ought to be known or advised to the insurers and I/We agree that this proposal and declaration shall form the basis of the contract between me/us and the Insurers.

I hereby declare to the best of my knowledge, that the personal information provided in this form is true, complete, and accurate. I will immediately inform the Company in writing of any changes to the information or details provided in this form.

Name Of Firm: _____

*Signature By Partner(S)_____

Date: ____/____/____

*This Proposal Form must be signed by a Partner. Signature of the Form does not bind the Firm or the Company to complete the Insurance.

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Fidelity Shield Insurance Company would, on occasion, like to keep you updated about its products and services which it considers may interest you.

Please tick any of these boxes indicating how you wish to receive our updates.

SMS

Phone Call

Email

If you wish to opt out of receiving these communications, please send us an email at info@fidelityshield.com or write to us at P. O. BOX 47435 or call us on +254(0) 709988000.

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PRIVACY NOTICE

Fidelity Shield Insurance Company Limited ("THE COMPANY" "The Company" "We" "Us") is a leading general insurance service provider offering a wide range of insurance products and services to individuals, corporates, small and medium enterprises, and the government. The company continuously reviews its operating processes, products and services to ensure that it sustainably delivers quality to exceed its customers' expectations.

This Privacy Notice provides an overview of information we collect about you, how we use and safeguard it. Please click this link to read the Company's Corporate Privacy Notice. <https://fidelityshield.com/>.

1. Scope of this Privacy Notice

This Privacy Notice applies to our customers (new & existing), agents/brokers or anyone who interacts with us regarding our services in any way. We refer to these individuals as ("you," "your") in this Notice. This Privacy Notice informs you of how we process, use and safeguard your personal information.

2. How we collect your personal data

We collect personal data directly by email, phone call or by hardcopy forms, book entries or correspondence such as letters. We also collect your information indirectly when you purchase our products or make enquiries or complaints through our website or through CCTV installed at any of our offices. When you give us any information about other people, you must ensure that they have Notice of this Privacy Notice and are comfortable with you disclosing such information.

3. Categories of personal data we collect.

We process the following categories of personal information about you: biodata, contact information, identification information, location data, source of income, claims details, response given to questions contained in our proposal or claim forms, information contained in policy documents, premium details, online identifies such as cookies and related tags, past claims history, any questions and complaints you may have. We also process sensitive personal data such as your gender, sexual orientation, marital status, property details including financial and health data. In relation to your beneficiaries and next of kin, we may process their biodata including names, contact information and location data.

4. How we use your personal data

The information you provide us will be used to process your insurance claim, to underwrite insurance products and provide you policy covers, process premiums, generate quotes, conduct KYC background checks before issuing you policy covers, seek valuation services before issuing you policy cover, to determine whether to engage the services of loss assessors, investigators or adjusters, to evaluate the legitimacy of your claim, to facilitate payment of your claim, process your renewal policy requests, send you promotional materials, establish exercise and defend legal claims and to comply with our legal obligations.

Should you fail to provide any or all the information requested in this form, we may not be able to offer our full range of services to you or offer our services as effectively as we wish to.

5. Sharing your personal data

We share your personal data within the company on a need-to-know basis. We also share your data with other third parties who help us provide services to you (for example website service providers, loss assessors, investigators and adjusters and consultants). We may also share your information when required to by law or court order. We take all reasonable steps to secure your data whenever we share it with third parties including vetting all third parties and, where appropriate, signing processing agreements with them. You can read more about what information may be shared in what circumstance in our full Privacy Notice.

6. International data Transfers

We may transfer your personal data outside Kenya to: -

- Website services providers
- Cloud service providers

We only share your data internationally to countries with appropriate safeguards as determined by law. We also put in place additional measures like processing agreements to safeguard your data. You can read more about what information may be transferred internationally and in what circumstance in our full Privacy Notice.

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7. Lawful grounds for processing your personal data.

We process your personal data on the following legal bases: -

- o informed consent
- o a requirement for performance of a contractual obligation
- o compliance with our legal obligations
- o our legitimate interests and for historical
- o statistical, journalistic, literature and art or scientific research.

We process personal data relating to next of kin and beneficiary on the following legal bases: - to perform contractual obligations, to comply with our legal obligations, for other legitimate interests and for historical, statistical, journalistic, literature and art or scientific research purposes.

8. Data Security

We have taken appropriate technical, physical, legal, and organizational measures consistent with applicable privacy and data security laws to protect the confidentiality, integrity and availability of your personal information.

9. Data Retention

We will use your personal data for as long as is necessary to fulfil the purpose for which was collected. We have policies and procedures in place that specify how long we keep your data in line with the law. We have also selected appropriate disposal methods for your personal data. You can read more about our retention and disposal procedures in our full Corporate Privacy Notice. If you no longer wish for us to hold your data, you can contact us by info@fidelityshield.com.

10. Your rights and duties

You have the right to be informed how we use your personal data. You also have the right to access your information and to ask us to correct, erase and restrict the use of your information. Additionally, you have the right to object to your information being used by us and to receive your personal data in a structured, commonly used, and machine-readable format and to transmit the data to another data controller or data processor without any hindrance. Where you have provided consent for use of your child's information, the transfer of your sensitive data internationally, the use of your personal data for commercial purposes or any other consent, you may withdraw your consent at any time. You also have the right to human intervention in any automated decision-making we may undertake using your data.

You have a duty to promptly inform us of any changes to your personal information.

11. How to Exercise Your Rights

If you wish to exercise any of your rights and freedoms rights or duties, please contact us on info@fidelityshield.com. We may contact you periodically to verify your personal information and to inform you of any changes to our Privacy Notice.

12. Our Contacts

If you have any questions, comments, complaints or suggestions about this privacy policy, or any other concerns about the way in which we process information about you, please contact us at info@fidelityshield.com or write to us at P. O .Box 4743.