



Traditional values – modern context

Travel Insurance Proposal Form

Tour Operators

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TRAVEL INSURANCE PROPOSAL FORM

Tour Operators New Business

Please print this document. It is a 'PDF' and you will need 'Adobe Acrobat Reader' in order to print. Please refer back to the website to download a free version of the reader.

Please complete the form as fully as possible and return it with the other documents requested to MPI Brokers.

In answering the following questions, should you need to expand on any answers please use the notes page at the back.

1 Company Name

2 Address

Tel. no.

Fax no.

Email

Contact Name

Position

3 Trading Name

4 Brochure Title(s)

| | | | |
|---|------------------------------|-------------|------------------|
| 5 | Number of passengers carried | This season | Est. next season |
| | | | |

| | | | |
|---|--|--|--|
| 6 | Number of passengers insured under your Scheme | | |
| | | | |

| | | | |
|---|---|---------|---------|
| 7 | Holiday costs per person for the current season | Average | Maximum |
| | | £ | £ |
| | | | |

| | | |
|---|--|---|
| 8 | Estimated increase/decrease of holiday costs next season | % |
| | | |

| | | | |
|---|---|------------|-------------------|
| 9 | Please show your current cancellation scale | Days/Weeks | % of Holiday Cost |
| | | | |
| | | | |
| | | | |
| | | | |

| | |
|--|----------|
| Will this be the same scale next season? | Yes / No |
|--|----------|

| | | |
|----|----------------------------------|---|
| 10 | What is your deposit per person? | £ |
| | | |

Please answer Questions 11-16 as a percentage of your carryings

| | | | |
|----|--|----------------------------|---|
| 11 | Please tell us where your customers go | Destination | % |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Other (list on notes page) | |

| | | | |
|----|----------------------------------|----------------------------|---|
| 12 | Please show the method of travel | Method | % |
| | | Flight | |
| | | Self Drive | |
| | | Coach | |
| | | Rail | |
| | | Other (list on notes page) | |

| | | | |
|----|---|----------------------------|---|
| 13 | Please tell us which countries your customers come from | Country of Domicile | % |
| | | UK | |
| | | Ireland | |
| | | EU | |
| | | Other (list on notes page) | |

14 Please identify the accommodation type

| Accommodation | % |
|----------------------------|---|
| Hotel | |
| Chalet | |
| Apartment | |
| Cruise | |
| Villa | |
| Other (list on notes page) | |

15 Please show your customers age profile

| Age Profile | % |
|-------------|---|
| Under 18's | |
| 18 – 30 | |
| 30 – 50 | |
| 50 – 65 | |
| Over 65 | |

16 Please show your customers travel pattern

| Days | % |
|------|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

17 Whilst on holiday do your customers do any of the following, whether offered by your company or not

| Activities | % |
|----------------------------|---|
| Wintersports | |
| Dinghy Sailing | |
| Water Skiing | |
| Canoeing | |
| Windsurfing | |
| Scuba Diving | |
| Whitewater Rafting | |
| Whitewater Canoeing | |
| Other (list on notes page) | |

18 Are you planning any changes to your Program next year e.g. new resorts or deletions?

| Changes |
|--|
| Yes / No (If yes please give details) |
| |

19 Please show the method of selling insurance

| Optional | Opt out | Inclusive |
|----------|---------|-----------|
| | | |

20 Please show the percentage of holidays sold through travel agents

| | |
|--|---|
| | % |
|--|---|

21 We will make recommendations for improving your current travel insurance arrangement, if appropriate. However, are there any particular items of cover or service you would like us to consider particularly where you may have had cause for concern in the past

| Cover |
|-------|
| |

| Service |
|---------|
| |

22 Important Dates

Please show the date you would like to receive our presentation / quote and other deadlines (not a.s.a.p.)

| | |
|--|------|
| | Date |
| Quote required by | / / |
| Renewal Date | / / |
| Brochure copy date | / / |
| Date you would expect to collect the first premium or have already collected | / / |

23 The period of contract

The contract period can be constructed in two ways

- i) Based on the travel date (although the premium will still be due the month after collection by you) or
- ii) Based on the date of booking or payment of the insurance premium whichever is the later

Please indicate which of the above methods you wish to adopt i) ii)

Note

Item (i) is the usual method for tour operators. Should neither of the above suit your method of doing business please discuss this with a representative of the brokers.

24 Current Broker and Insurer

Please show the name and address of your current broker and contact name

| |
|-----------------|
| Current Broker |
| Name: |
| Address: |

Please show the name of your current insurer

| Current Insurer |
|-----------------|
| Name: |

How many years have you placed business with this broker?

25 Do you hold a policy for crisis management insurance?

26 Please advise sums insured required for each section and excesses
 Ring 01428 664 265 if you require assistance

| Schedule of Sections and Sums Insured | | |
|--|-------------|--------|
| Section | Sum Insured | Excess |
| Medical | | |
| Hospital Benefit <i>(per night)</i> | | |
| Cancellation or Curtailement | | |
| Missed Departure & Delayed Arrival | | |
| Delayed Departure or Abandonment | | |
| Baggage <i>(Single Article Limit)</i> <i>(Valuables)</i> <i>(Delayed Baggage)</i> | | |
| Money | | |
| Passport Indemnity | | |
| Public Liability | | |
| Legal Expenses | | |
| Personal Accident | | |
| Wintersports Equipment <i>(Own equipment)</i> <i>(Hired equipment)</i> | | |
| Ski Pack | | |
| Piste Closure <i>(per day)</i> | | |

Declaration

I understand this is a request in the form of a proposal to provide us with a quotation for our customers travel insurance.

I agree to provide any further information requested.

I accept that if an indication is provided that this will be subject to further information or to underwriter's agreement which is not binding until we receive a quotation from you in writing.

The information supplied in this proposal form is to the best of my knowledge true and accurate and I am aware it will be shown to underwriters to form their judgment in setting premium for our customers travel insurance and it will be a binding part of our contract.

I have not withheld any material facts (a material fact is one which may affect underwriter's assessment of the risk and/or setting of rates. If you are in any doubt as to whether a fact is material or not it must be declared on this form).

Signed: _____ Date: _____

Position: _____

Have you completed the notes page for further explanations?

Yes / No

Additional Information

Please supply the following:

- 1) Three copies of your current brochure(s)
- 2) Current policy wording
- 3) Current rates and periods
- 4) A letter of Authority on your company headed paper and we recommend the following words:-

Dear Mr. Pettifer / Michael

We hereby request MPI Brokers to provide terms for our various insurance arrangements, and if acceptable, we will appoint your company as our brokers. Please accept this letter as authority to approach our current broker, and previous brokers if appropriate, or insurers to obtain claims and premium information. We look forward to your early reply.

Yours sincerely

