



ROTARY Oceania (ROZOPS) – Club or Trust Insurance Information

Association Liability Cover – Clubs or Trusts

- 1. Entity Name:
2. Employees: (Number of Paid Employees):
3. Income: Gross Income: \$ Total Assets: \$
Current Assets: \$ Total Liabilities: \$
Current Liabilities: \$ Last Financial Year Result: \$
4. Is the Association able to pay any or all its debts as and when they fall due:
5. Does the Association provide professional consultancy services for fee, commission or other remuneration (including grants to third party funding) above and beyond ordinary membership fees:
6. After enquiry or all Trustees and Board Members are you ware of any circumstance which could give rise to a claim, an investigation, examination, inquiry or other proceedings under this policy:
7. Is any income derived from outside New Zealand? (If so, please provide countries and split):
8. The activities outlined in (i)-(vi) below are covered under the standard definition of Professional Services. Are there any other services or activities that you wish the Insurer to consider providing cover for?

Professional Services means the following provided by the proposer:

- (i) Advocacy and promotion of the Association’s objectives and area of focus or interest, including publication or information in any media type;
(ii) Registration, training and accreditation of members;
(iii) Publication of professional or technical standards;
(iv) Acting as an insurance intermediary for the purpose of distributing personal lines, general and/or life insurance to members;
(v) Events for members and other that promote the Association’s area of focus or interest; or
(vi) Fundraising events

Professional Services does not include the following:

- (a) The provision of legal, financial or investment advice; or
(b) Medical treatment, medical care or medical advice.

PLEASE NOTE CAREFULLY

If you answered YES to Questions 5-8 or NO to question 4, please give full details below:

Five horizontal dashed lines for providing details.

DECLARATION AND SIGNATURE POLICY HOLDER DETAILS

- We have made inquiries of all appropriate persons to complete this proposal form.
- All answers and statements in this proposal are correct and complete in every respect and there is no further information which may affect acceptance of this proposal.
- If accepted by AIG Insurance New Zealand Ltd (“AIG”) this proposal and declaration, and any other material which I/we have provided to AIG will form the basis and shall be incorporated into the contract of insurance. I/we undertake to inform AIG of any material changes to the business or the information provided at all times.
- We understand that AIG required the information (which will be retained by AIG) in order to decide whether or not to accept this proposal, and also that the Privacy Act 1993 entitles me/us to have access to an request the correction of this information.
- AIG is authorised to disclose information received to its advisors, reinsurers and to other insurers. We authorise AIG to obtain, from any party, information that is, in AIG’s view, relevant to this proposal.
- We understand that the insurance will not be in force until and unless this proposal has been accepted and the terms of any cover have been confirmed by AIG.

Signed here:		
Signatories Full Name:		
Club / Trust Officers Role/Title:		
Rotary International District	District number	
Trust Name:		
Trust Contact:	Name	Email address
Date:		

PLEASE NOTE CAREFULLY

1. the above statements are representations to the Insurer. If you have any concerns before signing, contact ROZOPS to arrange for you to discuss with the broker.
2. these covers include cover for protection of youth engaged in Rotary programmes for youth.
3. AIG provides cover for prior periods of insurance under the retroactive provision of the schedule (Retroactive date TBC).
4. AIG provides cover for 1 District controlled trust
5. You are required to provide your Constitution and other documents as listed in the Information Pack within 4 weeks of signing this declaration.
6. You will receive an invoice for the premium as set out in the Information Pack.

ONLY COMPLETE IF YOU WISH TO OBTAIN A QUOTE/COVER FOR CYBER LIABILITY

Include Cyber protection?	YES	Signed:
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Cyber Protection cover:

1. We have access controls in place (e.g. passwords) for employees and other users to deny access to sensitive data on our computer systems and services.
2. We have security controls in place to prohibit unauthorised access to our computer services and any District owned laptops or similar. With cloud vendors systems we rely on the security and backup services provided. The main cloud systems used are 1. Clubrunner for membership relationship management services 2. Xero for accounting services and 3. Dropbox and/or Google Drive for cloud storage.
3. We have NOT sustained any single loss or losses, or suffered from any prior cyber breaches, including but not limited to data loss, network intrusion, hack attack (including telephone hacking), and any fines, in the last three years, for which this proposed insurance may respond to.
4. After enquiry of the Association officers and employees there is NO known knowledge of any act, omission, fact, event or circumstance which might give rise to a loss under this proposed insurance.