



KEYSTONE LEGAL
SINCE 1988

Commercial Proposal Form

Please include all correspondence relating to the dispute

Proposer

Name, if company			
Name, if individual			
Address			
Date of birth			
Is the proposer aware of any other insurances which may be relevant to this dispute? If YES, please provide details	YES	NO	
Is the proposer, or has the proposer, ever been insolvent or been made bankrupt or discharged from bankruptcy in the last five years, or been a director of a company which has been declared insolvent in the last three years? If YES, please provide details	YES	NO	
Occupation or nature of business		If a business, please state total turnover for the last financial year	£

Proposer's Legal Representation

Name and address of firm (please include DX if available)			
Identity partner/fee earner dealing with the legal action Email address Telephone number			
About the firm (please complete if you are a new firm to Keystone)	Number of partners		
	Number of assistant solicitors		
	Number of other fee earners		
Volume of litigation expressed as a percentage of total fee income		In which areas of litigation does the firm specialise?	
Percentage of litigation handled on a CFA basis	last year		
	this year		
	next year (estimate)		
What are your costs to date?		What are your disbursements to date?	
Please estimate your profit costs between now and conclusion of the case		Please estimate Counsel's fees between now and conclusion of the case	

The Opponent

Name and address of the opponent		
Legal status of the opponent (e.g. Limited Company, individual)		
Do you consider that the opponent will be able to pay damages and costs? If YES please enclose copies of any Status Reports obtained	YES	NO
Details of any additional parties in the dispute		
Name and address of the opponent's solicitors		

The Legal Action

Please attach a summary of the dispute including relevant dates / amounts in dispute / remedies required			
In addition to Counsel's Advice and Expert's Reports referred to above, please attach the following:			
<ul style="list-style-type: none"> • Witness statements • Correspondence between the parties • Contract Documents 			
Have you applied to any other insurer for cover in respect of this risk?		YES	NO
If YES has any other insurer declined this risk?		YES	NO
Date the cause of action arose		Date you were instructed	
Have legal proceedings been commenced?		YES	NO
If YES			
a) in which legal forum?		a)	
b) at what stage is the action?		b)	
c) If litigated, please provide a copy of the pleadings		c)	
Are you claiming or defending?		Claiming	Defending
Is there likely to be a Counterclaim?		YES	NO
If YES, give details			
Has liability been admitted?		YES	NO
If YES, on which date			
Have you complied with any pre-action Protocols		YES	NO Not Applicable
Has ADR been attempted?		YES	NO
If YES, please give details of the outcome of the ADR.			

<p>If an Expert has been appointed, please provide relevant details (and a copy of any reports prepared)</p> <p>If an Expert is yet to be appointed, please provide a description of the expertise that will be sought</p>		
<p>Details of any settlement proposals to date (please specify if made pursuant to Part 36)</p>		
<p>What is the lowest value of settlement the proposer considers acceptable?</p>	£	
<p>Have you entered into a CFA?</p> <p>Date of agreement</p> <p>Percentage uplift</p> <p>If YES, please provide a copy</p>	<p>YES NO</p>	
<p>Have you or will you be instructing Counsel?</p> <p>If YES, please name the Chambers and the Counsel</p> <p>Is Counsel entered into a CFA?</p> <p>If Counsel has advised, please provide a copy of any written advice or your attendance note(s)</p>	<p>YES NO</p> <p>YES NO</p>	
<p>What is the lowest value of settlement instructing solicitors consider acceptable?</p>	£	
<p>What do you think are the prospects, in percentage terms, of achieving this?</p>		
<p>Please give brief details of the main arguments, in your opinion that might be used by the opponent</p>		

Cover Required

Please estimate your own disbursements up to and including trial	
Please give your best estimate of the opponent's total costs to trial (including disbursements)	

Proposer's signature	
Name in capitals	
Title or position held	
Date	

Solicitor's signature	
Name in capitals	
Date	