



Valuation Services Panel Guide

WHAT IS THE PANEL?

As part of our ongoing commitment to delivering enhanced value and comprehensive support to our Members, Unimutual has established a Valuation Services Panel ("the Panel"). The purpose of the Panel is to assist Members in identifying qualified providers who can meet their specific valuation needs, particularly in relation to discretionary protection. These valuations play a crucial role in helping Members assess the replacement and insurable values of their assets, ensuring appropriate protection levels. The providers included in the Panel, which are listed on page 2, are companies that have been frequently used by our Members.

Unimutual has also negotiated preferential terms with the providers on the Panel, securing **a minimum 5% discount on their standard rates**. This arrangement is intended to provide cost savings to Members with reputable valuers. Each engagement with a Panel provider will be individually assessed to account for the specific scope and time requirements of the valuation. Additionally, Members may benefit from further discounts through competitive tender processes, multi-location or portfolio engagements, or in accordance with their own procurement policies. Our aim is to provide flexible, cost-effective options for Members, while still giving them the freedom to choose a provider that best meets their unique needs..

Please note that Members are not obligated to use the Panel and are free to choose any valuers that best meet their needs.



SELECTING A VALUER FROM THE PANEL

The following is a brief guide on several key factors to consider when selecting a provider and is not intended to be comprehensive.

1. Member's corporate procurement policy requirements



Selection of a valuer from the Panel is still subject to Members' internal procurement policies and procedures, such as sourcing methods, thresholds, required quotes, due diligence, compliance and contractual obligations. The Panel does not override any Member's established procurement governance requirements.

2. Clear identification of the scope of valuation



Before approaching a valuer, it is important to identify all assets under the Unimutual Property Protection, which may include property, controlled environments, heritage buildings, works of art, and other collectibles.

Documentation should also include asset characteristics such as age, condition, location, cultural significance (for heritage items) and environmental conditions (for controlled environments). The detailed valuation scope can be used to obtain detailed quotes from multiple providers, as needed, based on the type, size, and complexity of the assets and specialist skills required.

3. Engagement, Selection and Performance Monitoring



Members should engage directly with the Panel providers to brief them on the scope of work, ensuring an appropriate understanding of the specific characteristics of the assets to be valued. All quotes should be in writing and include relevant fee breakdown and discounts.

The final provider selection should be based on the overall value of each quote. Some key considerations include:

Scope of service: Ensure the assets covered, valuation methodology, and deliverables are in line with the Member's requirements.

Timing and availability: Assess the proposed timelines and the provider's ability to complete the work on time.

Expertise and qualifications: Consider the provider's experience with similar assets, specialised skills and relevant qualifications.

Fees: Ensure all costs are included (e.g., travel, site visits, and report preparation). Compare hourly rates versus fixed fees to determine the best fit for each Member's needs.

Agreement: Ensure a formal agreement is in place before work begins and that the valuer's performance against the agreement is monitored to completion.

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Any Questions?

Should there be any questions regarding the Panel, please contact Tobias Pfau, Chief Underwriting Officer, at tobias.pfau@unimutual.com.au.

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