



Contractor Information

Corporation Proprietorship Partnership LLC LLP Other
Principal/Company: Federal Tax ID:
Address: Phone Number:
Year Company Started: Operations Under Current Management Since: Operating Territory:
Type of Construction Performed:
Total Current Work On Hand: Number of Jobs: Estimated Cost to Complete: \$ Number of Bonded Jobs:
List any related entities or business interests:
Most recent year company: Gross Revenue Net Worth Net Income
Has the company ever failed to complete a contract? Yes No
Has the company, any stockholder, owner, partner or any affiliate ever filed for bankruptcy or been placed in receivership? Yes No
Are you involved in any litigation? Yes No
Has the company, any officer, owner, or partner been in claim with a surety? Yes No

Explain all "Yes" answers:
Prior/Current Surety and any bonds outstanding

Owner/Indemnitor Information

* Provide information on all Owners and their respective spouses:

Table with 6 columns: Name, Address (No P.O. Box), Social Security Number, % of Ownership, Yrs. in Construction, Title. Rows for Owner and Spouse.

(If all Owners not listed, please attach additional application)

Contract Bond Information

Obligee/Owner:
Address:
Job Description:
Estimated Bid Price/Contract: \$ Bid Date:
Anticipated Start Date: Time For Completion: Liquidated Damages: \$ Warranty Period:
Bid Results: 1) / \$ 2) / \$ 3) / \$
Bid Bond Amount or Percentage: Performance Bond Amount or Percentage:
Payment Bond Amount or Percentage: Maintenance Bond Amount or Percentage:
Bond Forms:

*Please include copy of the contract and required bond forms if applicable

Bank References

Name of Bank: Date Account Established:
Address:
Name of Loan Officer: Phone:
Amount of Bank Line: \$ Amount of Bank Line Currently in Use: \$ Expiration Date:

Job Experience

Largest Work On Hand: \$ Year:
Please list the two largest contracts completed:
1) Job Description: Contract Price: \$
Your Contract With (Owner/General Contractor):
Name of Person to Contact: Phone: Fax:
2) Job Description: Contract Price: \$
Your Contract With (Owner/General Contractor):
Name of Person to Contact: Phone: Fax:



Personal Financial Statement

Confidential

Full Name: _____ Spouses Name: _____

Statement Date As of (mm/dd/yy): _____

<u>Assets</u>	<u>Amount</u>	<u>Liabilities—Current</u>	<u>Amount</u>
Cash on Hand and in Banks		Notes Payable to Banks—Secured	
U.S. Government Securities		Notes Payable to Banks—Unsecured	
Listed Securities		Notes Payable to Relatives	
Unlisted Securities		Notes Payable to Others	
Retirement Funds (eg. IRA's, 401K)		Accounts Payable	
Accounts Receivable—Relatives		Unpaid Income Tax	
Notes Receivable—Relatives		Other Unpaid Taxes	
Real Estate Owned—Residence		Real Estate Mortgages Payable—Residence	
Real Estate Owned—Other		Real Estate Mortgages Payable—Other	
Real Estate Mortgages Receivables		Other Debts—List	
Automobiles and Other Personal Property			
Cash Value Life Insurance			
Other Assets—List			
		<u>Liabilities Long Term</u>	<u>Amount</u>
		Real Estate Mortgages Payable—Residence	
		Real Estate Mortgages Payable—Other	
		Other Long Term Debt—List	
Total Assets		Total Liabilities	
**If more than one Owner, attach additional Personal Financial Statement.		(Total Assets - Total Liabilities = Net Worth)	
		Total Liabilities + Net Worth	

The undersigned submits the following as being a true and accurate statement of his or her financial condition on the date shown above and acknowledges that Surety will be relying on the representations made herein.

Agency Information

Agency Name: _____ Agency Phone: _____

Agents Name: _____

- Is the contractor an existing insurance client? Yes No
- Are all insurance premiums current? Yes No
- Length of relationship between Agent/Contractor: _____

The Undersigned hereby authorizes the Surety to make such pertinent inquiry as may be necessary from financial institutions, credit reporting agencies and all other persons, firms and corporations in order to confirm or verify information referred to or listed herein.

Signed: _____ Date: _____