

Contractor: _____ **Date:** _____

Existing Business Continuity Plan? Yes No _____

Work Experience and Scope of Work _____

Type of work you subcontract out _____

Formation of business _____

Previous Surety _____ Largest Bond _____

Reason for Changing _____

Has client ever been denied a bond Yes No If so, why? _____

List 3 Largest completed jobs within the past five years:

(1) Type of work _____ Bonded? Yes No

Contract price _____ Gross Profit _____ Date Completed _____

Owner's name and address _____

Architect of Engineer (name & phone) _____

(2) Type of work _____ Bonded? Yes No

Contract price _____ Gross Profit _____ Date Completed _____

Owner's name and address _____

Architect of Engineer (name & phone) _____

(3) Type of work _____ Bonded? Yes No

Contract price _____ Gross Profit _____ Date Completed _____

Owner's name and address _____

Architect of Engineer (name & phone) _____

Banking Facilities and Accounting

Name & Address _____

Phone Number _____ Contact Person _____

Line of credit established _____ Are Personal Endorsements Required?

How is credit secured? _____

Fiscal year end statements prepared by:

Name & Address of Accountant _____

On what basis are financial statements prepared? Cash Completed Job Accrual % of Completion

What level of assurance are financial statements prepared? Audited Reviewed Compiled

How often do you do trial balances? Monthly Quarterly Other _____

Contractor Projection

What is the largest job the contractor would bid in the near future? _____

What is the anticipated average work load the next 12 months? _____

List all key personnel in addition to owners

Employee	Position	Age	Yrs. with firm	Scope of work

List all life insurance on key personnel

Insured	Amount	Type	Beneficiary	Insurer

List any subsidiaries and affiliates of the contracting firm (and attach financial statement):

Firm Name	Ownership	Type of Business

Insurance Now Carried:

Workman's Compensation and/or Employer's Liability: Limits: _____ Co: _____
 Public Liability: Limits: _____ Co: _____ Auto Liability: Limits: _____ Co: _____
 Subcontracts Contingent Liability: Auto Liability: _____
 Limits: _____ Co: _____ Limits: _____ Co: _____

Explain any "yes" answers from Express Bond Application: _____

