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Contractor's Bond Kit

Thank you for allowing The Surety Group to consider your account for bonding.
Following is a list of items needed to get you set up for bid, payment and performance bonds.
Please be sure to complete all forms to the best of your ability and to provide us with as much information as possible. Do not hesitate to contact us with any questions or concerns.
We look forward to finding solutions to all of your future bonding needs.

Financial Statements

Please provide copies of the company's CPA prepared fiscal year-end financial statements for the ***last 3 years***.

- ✓ The statements must be prepared by a Certified Public Accountant (CPA) and prepared using the percentage of completion method of accounting.
- ✓ If your company is new or has recently incorporated, please have your CPA prepare an opening statement.
- ✓ If your statement is more than six months old, please include an interim statement not more than 90 days old.

Forms to Complete

Please complete the following forms to the best of your ability. To avoid underwriting delays, please be sure to complete all necessary forms.

Business Information

- ✓ Contractor's Questionnaire
- ✓ Personal Financial Statement--*All owners, partners, stockholders or members must provide a personal financial statement.*
- ✓ Business Plan
- ✓ Resume--*All owners, partners, stockholders or members and key personnel must provide a resume.*
- ✓ Indemnity Agreement Information
- ✓ Work on Hand

References

- ✓ Bank Reference Letter—*Please have your bank representative complete this form.*
- ✓ Previous Jobs Reference Letter—*Please have a representative from your **3 largest projects** complete this form.*
- ✓ Supplier Reference Letter—*Please have a representative from your **3 prime suppliers** complete this form.*

Bond Request Forms

- ✓ Bid Bond Request Form—*Please complete the form only if you have a current bid bond request.*
- ✓ Payment and Performance Bond Request Form—*Please complete this form only if you have a current payment and performance bond request.*
- ✓ Job Cost Breakdown—*Please complete this form to accompany any bond request.*

Other Items Needed

Please provide us with the following additional items.

Tax Returns

- ✓ Corporate Tax Returns for the ***Last 3 Years***. If you have filed an extension for this year, please provide us with a copy of the extension.
- ✓ Personal Tax Returns for the ***Last 3 Years***. All owners, partners, stockholders or members must submit their tax returns. If you have filed an extension for this year, please provide us with a copy of the extension.

Current Certificate of Insurance

- ✓ Please provide a certificate of commercial coverage.

As sufficient time is need to carefully consider all aspects of your submission, the more information you can provide, the sooner a decision can be made. Please be sure to pay close attention to all forms as any incomplete or incorrect forms will results in underwriting delays. Should you have any questions or concerns, please do not hesitate to contact our agency.

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