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# Contractor's Questionnaire

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## Business Information

Business Name: \_\_\_\_\_  
 Please provide exact business name to be listed on your bond

Business Address: \_\_\_\_\_  
 Please list FULL address to be listed on your bond

Sole Proprietorship  Partnership  S Corp  C Corp  LLC EIN: \_\_\_\_\_

Effective Date of Business: \_\_\_\_\_ Year & State of Incorporation: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Alternate Phone: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Website: \_\_\_\_\_

Company Specialty: \_\_\_\_\_

Affiliated Companies: \_\_\_\_\_

% of Work Performed In-House: \_\_\_\_\_ % of Work Subcontracted: \_\_\_\_\_

## Owner Information

Please list all owners, partners, stockholders and/or members.

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

Home Address: \_\_\_\_\_

Title: \_\_\_\_\_ % of Ownership: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Spouse's SSN: \_\_\_\_\_

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

Home Address: \_\_\_\_\_

Title: \_\_\_\_\_ % of Ownership: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Spouse's SSN: \_\_\_\_\_

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

Home Address: \_\_\_\_\_

Title: \_\_\_\_\_ % of Ownership: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Spouse's SSN: \_\_\_\_\_

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

Home Address: \_\_\_\_\_

Title: \_\_\_\_\_ % of Ownership: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Spouse's SSN: \_\_\_\_\_

## Reference Information

### Completed Projects

Please list 5 of the largest projects ever completed by your firm.

**Project Title:** \_\_\_\_\_ **Contract Amount:** \_\_\_\_\_

Obligee Name: \_\_\_\_\_

Obligee Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Date Completed: \_\_\_\_\_ If Bonded, Name of Surety: \_\_\_\_\_

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**Project Title:** \_\_\_\_\_ **Contract Amount:** \_\_\_\_\_

Obligee Name: \_\_\_\_\_

Obligee Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Date Completed: \_\_\_\_\_ If Bonded, Name of Surety: \_\_\_\_\_

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**Project Title:** \_\_\_\_\_ **Contract Amount:** \_\_\_\_\_

Obligee Name: \_\_\_\_\_

Obligee Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Date Completed: \_\_\_\_\_ If Bonded, Name of Surety: \_\_\_\_\_

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**Project Title:** \_\_\_\_\_ **Contract Amount:** \_\_\_\_\_

Obligee Name: \_\_\_\_\_

Obligee Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Date Completed: \_\_\_\_\_ If Bonded, Name of Surety: \_\_\_\_\_

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**Project Title:** \_\_\_\_\_ **Contract Amount:** \_\_\_\_\_

Obligee Name: \_\_\_\_\_

Obligee Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Date Completed: \_\_\_\_\_ If Bonded, Name of Surety: \_\_\_\_\_

### Prime Suppliers

Please list your 3 prime suppliers.

Company Name: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

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Company Name: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

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Company Name: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

## Company Background Information

Has your company ever been bonded?  Yes  No

Previous Surety: \_\_\_\_\_

Reason for changing sureties: \_\_\_\_\_

Largest Bonded Project: \_\_\_\_\_

Largest Work Program: \_\_\_\_\_

Has your company ever been declined for bonding?  Yes  No

Has your company ever failed to complete a project on schedule?  Yes  No

Is there any litigation or claims pending on completed work?  Yes  No

Has your company or any of its principals ever petitioned for bankruptcy, failed in business or defaulted so as to cause a loss to a surety?  Yes  No

Have any owners/partners/stockholders/members ever had an arrest, indictment, imprisonment or conviction?

Yes  No

## Financial Data

Date of Fiscal Year End: \_\_\_\_\_

CPA Name/ Address: \_\_\_\_\_

On what basis are financial statements prepared?  Cash  Accrual  % of Completion  Complete Contract

Classification of year-end financial statement:  Audit  Review  Compilation

How often are financial statements prepared?  Annually  Semi-Annually  Quarterly

## Banking Data

Bank Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Do you have an established line of credit?  Yes  No

Amount: \_\_\_\_\_

How much is currently available: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

The line is  Unsecured  Secured

Type of Security: \_\_\_\_\_

## Insurance Data

General Liability Insurance Carrier: \_\_\_\_\_

Hazardous Liability Insurance Carrier: \_\_\_\_\_

Workers Compensation Insurance Carrier: \_\_\_\_\_

This application consists of this instrument, the financial statement, and an indemnity, security, and trust agreement signed by the applicant with regard to the bond or bonds requested, such financial statement and agreements incorporated herein by reference.

The undersigned, and each of us authorized the Surety to obtain credit information and to make such other investigation, as it deems necessary to underwrite this application. The undersigned, and each of us further represent that the information contained in this application and all documents referred to herein is true and that such information is being submitted for the purpose of indicating Surety to issue bond(s) and that Surety is relying upon such information as a condition to the issuance of such bond(s).

In addition to the information contained in this application as well as the terms and conditions thereof, applicant acknowledges that he has been advised that the surety may, as additional collateral, require insurance on the principal or key employees with surety named as beneficiary. In case of death said collateral shall be used to indemnify surety against loss or expense. If said collateral shall be required, applicant agrees to provide same at issuance of bond or if unable to so provide, applicant agrees that surety may secure same at applicant's expense.

In the event that a bond or bonds are issued, the undersigned and all indemnitors of the undersigned, if any, agrees to pay or cause to be paid the premium at the rate charged therefore, and any additional charge for contract increases, if any, that may be due to Surety.

X \_\_\_\_\_  
*Signature & Title*

Date: \_\_\_\_\_

X \_\_\_\_\_  
*Signature & Title*

Date: \_\_\_\_\_