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## CONTRACTOR'S BOND QUESTIONNAIRE

### Background:

Name of firm: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ County: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ State of Incorporation: \_\_\_\_\_  
 Email: \_\_\_\_\_ Website: \_\_\_\_\_  
 Type of Business: Proprietorship  Partnership  LLC  S-Corp  C-Corp   
 Federal Employer ID Number \_\_\_\_\_ Fiscal Year End: \_\_\_\_\_  
 Year Company Started: \_\_\_\_\_  
 Geographic Area of Operation: \_\_\_\_\_  
 Construction Specialties: \_\_\_\_\_

### What percentage of the firm's work is normally performed as:

Prime Contractor: \_\_\_\_\_ % Subcontractor: \_\_\_\_\_ %  
 Public Work: \_\_\_\_\_ % Private Work: \_\_\_\_\_ %

What percentage of work is normally subcontracted? \_\_\_\_\_ %

### List any subsidiaries and / or affiliates of the contracting firm:

Name:	Ownership:	Type of Business	Indemnify?
1.			
2.			
3.			

### Organization - Owners and Key Employees

List the officers, partners or proprietors of your firm:

Name \_\_\_\_\_ Position \_\_\_\_\_ Ownership \_\_\_\_\_ %  
 SS#: \_\_\_\_\_ DOB: \_\_\_\_\_ Spouse Name: \_\_\_\_\_ SS# \_\_\_\_\_  
 Residential Address: \_\_\_\_\_ Res. Phone No. \_\_\_\_\_

Name \_\_\_\_\_ Position \_\_\_\_\_ Ownership \_\_\_\_\_ %  
 SS#: \_\_\_\_\_ DOB: \_\_\_\_\_ Spouse Name: \_\_\_\_\_ SS# \_\_\_\_\_  
 Residential Address: \_\_\_\_\_ Res. Phone No. \_\_\_\_\_

Name \_\_\_\_\_ Position \_\_\_\_\_ Ownership \_\_\_\_\_ %  
 SS#: \_\_\_\_\_ DOB: \_\_\_\_\_ Spouse Name: \_\_\_\_\_ SS# \_\_\_\_\_  
 Residential Address: \_\_\_\_\_ Res. Phone No. \_\_\_\_\_

Is there a buy/sell agreement among the owners of the business? Yes  No

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

If yes, explain: \_\_\_\_\_

Is your firm or any of its owners or officers currently involved in any litigation? Yes  No

List the key personnel of your firm, which may include: officers, managers, superintendents, engineers, project manager, estimators, and others. (If available, please attach a separate, detailed resume of each person's construction experience):

Name	Year Hired	Present Position	DOB	# Years of Experience	Summarize: Education, work experience Prior Employers, etc.

**Bonding**

Name of present surety: \_\_\_\_\_

Name of present agency: \_\_\_\_\_

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

How long were you with present surety? \_\_\_\_\_ Reason for changing: \_\_\_\_\_

**Banking**

Bank Name: \_\_\_\_\_ Contact Person \_\_\_\_\_

Address: \_\_\_\_\_ Phone # \_\_\_\_\_

Line of Credit Amount \$ \_\_\_\_\_ Expiration Date: \_\_\_\_\_ How is it secured? : \_\_\_\_\_

Amount of bank line currently in use? \$ \_\_\_\_\_

## Accounting

Your bookkeeper or in-house accountant: \_\_\_\_\_ In-house software \_\_\_\_\_

Your CPA firm: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

On what basis are taxes prepared?

Percentage of completion \_\_\_\_\_ Completed contract \_\_\_\_\_ Accrual \_\_\_\_\_ Cash \_\_\_\_\_

On what basis are financial statements prepared?

Percentage of completion \_\_\_\_\_ Completed contract \_\_\_\_\_ Accrual \_\_\_\_\_ Cash \_\_\_\_\_

On what level of assurance are fin. statements prepared & how often (Annual, Semi-Annual, Quarterly, Monthly)

CPA Audit \_\_\_\_\_ CPA Review \_\_\_\_\_ CPA Compilation \_\_\_\_\_ Internal \_\_\_\_\_

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## Job Experience

Largest single job completed: \$ \_\_\_\_\_ Year: \_\_\_\_\_

Largest backlog (cost to complete) of work on hand at one time: \$ \_\_\_\_\_ Year: \_\_\_\_\_

Largest single job bid: \$ \_\_\_\_\_ Year: \_\_\_\_\_

### List five of your largest contracts:

1. Job description: \_\_\_\_\_

Location: \_\_\_\_\_ Completion: \_\_\_\_\_ Bonded: Yes  No

Final contract price: \$ \_\_\_\_\_ Final gross profit?: \_\_\_\_\_

Owner: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

2. Job description: \_\_\_\_\_

Location: \_\_\_\_\_ Completion: \_\_\_\_\_ Bonded: Yes  No

Final contract price: \$ \_\_\_\_\_ Final gross profit?: \_\_\_\_\_

Owner: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

3. Job description: \_\_\_\_\_

Location: \_\_\_\_\_ Completion: \_\_\_\_\_ Bonded: Yes  No

Final contract price: \$ \_\_\_\_\_ Final gross profit?: \_\_\_\_\_

Owner: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

4. Job description: \_\_\_\_\_

Location: \_\_\_\_\_ Completion: \_\_\_\_\_ Bonded: Yes  No

Final contract price: \$ \_\_\_\_\_ Final gross profit?: \_\_\_\_\_

Owner: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

5. Job description: \_\_\_\_\_

Location: \_\_\_\_\_ Completion: \_\_\_\_\_ Bonded: Yes  No

Final contract price: \$ \_\_\_\_\_ Final gross profit?: \_\_\_\_\_

Owner: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

**References**

List three of your major suppliers:

	Name	Address	Contact	Phone
1.				
2.				
3.				

List three subcontractors (or General/Primes if you are a subcontractor) that you do business with:

1.	Name:	Phone:
	Address:	Contact:
2.	Name:	Phone:
	Address:	Contact:
3.	Name:	Phone:
	Address:	Contact:

List three architects/engineers you have done business with:

1.	Name:	Phone:
	Address:	Contact:
	Job (s):	
2.	Name:	Phone:
	Address:	Contact:
	Job (s):	
3.	Name:	Phone:
	Address:	Contact:
	Job (s):	

**Certification: I certify that all information is complete and correct, and is given to induce the designated surety company to execute surety bonds. I understand that false information may constitute misrepresentation or fraud. I authorize the designated surety company to obtain credit information, and to make such other investigation as it deems necessary to underwrite this application.**

Contractor Name: \_\_\_\_\_  
 By: \_\_\_\_\_ Title: \_\_\_\_\_  
 Date: \_\_\_\_\_