

Completing Your Submission



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 - 994
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Contractors Questionnaire

- ☞ 3 Page Document
- ☞ Summary of your Company
- ☞ Affiliates
- ☞ Financial Information
- ☞ Largest Projects
- ☞ Supplier Reference
- ☞ Bank Information
- ☞ Credit Authorization

General Indemnity Info Request

- Information For General Indemnity Agreement
- GIA is Provided After Surety Approves You
- Original Agreement with Notarized Signatures is Filed With The Surety



Personal Financial

∞ Personal Assets

∞ Personal Net Worth

∞ Personal Liabilities

∞ Details



Company Financial Statement

☞ 3 Years

☞ Tax Returns

☞ Interim

☞ Balance Sheet

☞ Income Statement

☞ Accounts Receivable

☞ Accounts Payable

Bank Reference Letter

- ✎ Letter or 3 Current Months Bank Statements
- ✎ Personal
- ✎ Business
- ✎ Line of Credit
 - Agreement



Work on Hand

Name of Contractor A1 Contractor \$1,000,000 single/ \$1,500,000 aggregate Date as of 10 / 15 / 15

	DESCRIPTION OF JOB (If Cost Plus, Please Indicate)	START DATE (mm/yy)	COMP. DATE (mm/yy)	CHECK BONDED	IF UN-BONDED	Col. 1 CONTRACT PRICE (Including Approved Change Orders)	Col. 2 CONTRACTORS ESTIMATE COST When bid (and Cost of Appr. Change Orders)	Col. 3 TOTAL BILLED TO DATE Including Retainage	Col. 4 TOTAL COST TO DATE	Col. 5 TOTAL ESTIMATE COST TO COMPLETE
1	New Roof Project	8/1/15	12/1/15	X		1,000,000	850,000	400,000	430,000	420,000
2										
3	Gutter Replacement	11/1/15	2/1/16	X		500,000	450,000	0	0	450,000
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
TOTALS						1,500,000				870,000
TOTAL UNCOMPLETED WORK (COL. 1 minus Col. 3) :							BONDED :			
TOTAL UNCOMPLETED WORK BY SUBCONTRACTOR:							UNBONDED :			

Name _____

Title _____

Signature _____

Remarks _____

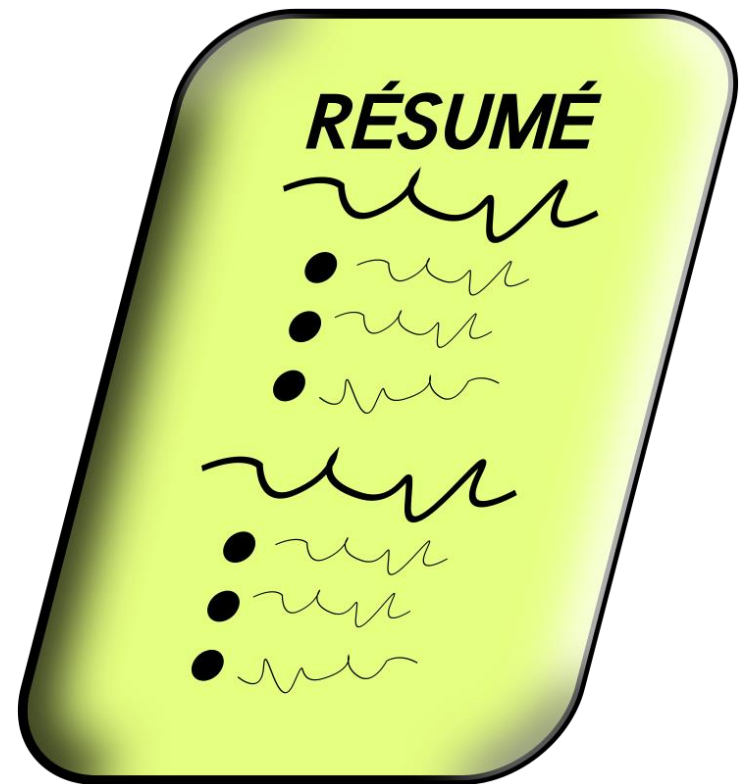
Resume

∞ Your Format is Acceptable

∞ All Owners

∞ Key Personnel

- Project Manager
- Estimator



Business Plan

∞ Past, Present, & Future

∞ Continuity Plan



Broker of Record Letter

Appointing us to be your Broker of Record with Respect to Bonding



SBA Forms

☞ SBA 994

- Background Info
- Page 2 - Bond Request

☞ SBA 912

- YES Answer
 - Question 7
 - Ineligible
 - Question 8 or 9
 - Court Documents
 - Witten Detail Explanation
 - Fingerprint Card

☞ Experience Certificate

- Prior Experience as Project Manager
- SBA Only
- Completed by Prior Employer

Questions?



Thank You

Eli Salazar, *Senior Bond Representative*
Preferred Bonding & Insurance Services



www.preferredbonding.com

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