

Application Worksheet

STEP 1:

Copy the package - Save the original copy of the forms for future use. You will need to reuse the Work in Progress Report, Bond Request, and Bid Tabulation Forms repetitively in the future - make copies as necessary.

Step 2:

- _____ Complete the "Contractors Questionnaire" - Please include Phone and Fax numbers for all references.
- _____ Have "Key" personnel provide a copy of their resume.
- _____ Have your banker complete "Bank Letter" on the bank's letterhead and mail direct to us.
- _____ If your company is a corporation, complete the "Corporate Resolutions".
- _____ Include a current personal financial statement of all owners of 10% or more of the company.
- _____ Complete the "Work in Progress Report".
- _____ Have your insurance agents provide a "Certificate of Insurance" for CGL, WC and Auto.
- _____ Complete and have owners sign and date the "Credit Authorization".

STEP 3:

Copy the following:

- _____ Last 3 years company financial statements: If you desire bonding limits of \$150,000 or less on a single job, we can accept properly completed internally prepared statements; for \$150,000-\$350,000 we need a CPA prepared "compiled" statement on a "percentage of completion" basis; for \$350,000+ we need a "reviewed" CPA prepared statement on the "percentage of completion" basis.
- _____ Most current quarterly financial statement (internally or CPA prepared).
- _____ Current aging of Accounts Receivable and Accounts Payable.
- _____ Last 3 years income tax returns for the company and owners.
- _____ If the company is incorporated, Certificate and Articles of Incorporation.
- _____ If the company is a sole proprietorship, an Assumed Name Certificate.
- _____ If the company is a partnership, the Partnership Agreement and Assumed Name Certificate.

CONGRATULATIONS!

Please mail or email the information to us. We should have an answer to you within 4 to 5 working days. Do not hesitate to call if you have any questions.

WE APPRECIATE THE OPPORTUNITY TO PROVIDE OUR SERVICES TO YOU!