

- Individual
- Partnership
- Corporation
- Limited Liability Company
- Limited Liability Partnership



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Contract Surety – Small Contract Bond Application (Please Print or Type)

For Single Bonds or Aggregate Bond Programs over \$100,000 and up to \$500,000. (This application is not intended for: Subdivision or site improvement, environmental or hazardous material, completion, asbestos abatement or multiyear contracts.

GENERAL INFORMATION:

Company Name _____ Fiscal Year End: _____
 Address _____ City _____ State _____ Zip _____
 Type of work? _____ Cell _____
 Date Business Started: ___/___/___ Ph: _____ Fax: _____ E: _____

LIST OWNERS AND OFFICERS OF THE COMPANY AND THEIR SPOUSES:

1. Name _____ % Ownership _____%, DOB _____
 Home Address _____ City _____ State _____ Zip _____
 SS# _____ DL# _____ Married Yes No; Rent Own
 Spouse Name _____ SS# _____ DOB _____ DL# _____

2. Name _____ % Ownership _____%, DOB _____
 Home Address _____ City _____ State _____ Zip _____
 SS# _____ DL# _____ Married Yes No; Rent Own
 Spouse Name _____ SS# _____ DOB _____ DL# _____

3. Name _____ % Ownership _____%, DOB _____
 Home Address _____ City _____ State _____ Zip _____
 SS# _____ DL# _____ Married Yes No; Rent Own
 Spouse Name _____ SS# _____ DOB _____ DL# _____

BOND REQUEST DATA: If no bond is needed at this time, but only prequalification for future bonding, check here

Anticipated start date ___/___/___, Time for Completion ___/___/___, Maintenance Period _____
 Obligor name (who is requiring the contractor get a bond) _____
 Obligor Address _____ City _____ State _____ Zip _____ Ph _____
 Job Description _____
 Job Location _____
 What is your total work on hand (cost to complete) not including this job? \$ _____ Liquidated Damages: _____

Status of Outstanding Bid or Performance Bonds:

1. Bond No. _____ Bid Awarded: Yes No; 2. Bond No. _____ Bid Awarded: Yes No
 Total work on hand (cost to complete) not including this job? \$ _____ Liquidated Damages: _____

Check and complete: (Please attach a copy of the contract and any required bond forms) (Check one only)

Bid Bond Only (not applicable if requesting a final bond) **OR** Final Bond Only: Contract price \$ _____
 Bid Date _____ Performance & Payment Bond Supply Bond
 Contract Date (Date when contract signed) _____ Subcontractor Performance & Payment Bond
 Est. total amount of bid: \$ _____ Stand Alone Maintenance Bond \$ _____
 Bid Bond % or flat amount _____ Bid secured by: Check ; Bond ; Negotiated
 Bid results: 2nd \$ _____ 3rd \$ _____ Low \$ _____
 Highest \$ _____ Engineering Est. \$ _____

Contractor's Company Name _____ File Number (s) Reference _____
Contractor's Company Address _____ City _____ State _____ zip _____

FINANCIAL DATA: Please submit the following:

Business Financial Information:

- 1) For (c) Corp, (s) Corp, and LLC's.: Provide the company's latest CPA prepared fiscal year –end financial statement. If a CPA prepared financials is unavailable, provide the company's in –house prepared fiscal year-end financial statements along with the company's most recent tax return.
- 2) For Sole Proprietorships and Partnerships: Provide the company's latest CPA prepared fiscal year –end financial statement. If a CPA prepared financials is unavailable, provide the company's in –house prepared fiscal year-end financial statements and a copy of Schedule C from the owners' most recent personal tax returns.

Personal Financial Statements: Provide a copy of each owner's personal financial statement. Include supporting bank and marketable securities statements for verification purposes.

WORK HISTORY & EXPERIENCE: Please list the (3) largest completed contract jobs within the past five years.

	Owner 's name, address & Ph No.	Type of work	Location (City/County, State)	Contract Amount	Date Completed	Contract Price \$	Gross Profit \$
1.	_____	_____	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____	_____	_____

CURRENT WORK IN PROGRESS: List your active open contracts:

	Owner 's name, address & Ph No.	Type of work	Location (City/County, State)	Contract Amount \$	Date Completed	Contract Price \$	Gross Profit \$
1.	_____	_____	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____	_____	_____

Bank Information:

Bank Name _____ Formal Line of Credit? Yes No; If yes how much \$ _____; Date Expires _____
Contact name _____ Ph: _____; Outstanding? \$ _____; How secured _____

GENERAL QUESTIONS:

- Are there other companies owned by stockholders/owners of applicant? Yes No
- Are there any assets held in trust or pledged by company or stockholders? Yes No
- Has applicant ever received surety credit? Yes No
- Has applicant been denied surety credit or involved in a claims(s) with surety Yes No
- Are federal and state taxes currently delinquent? Yes No
- Have federal or state taxes been delinquent in the past three years? Yes No

If "yes" to any of the above questions please provide details in the space below

WE CERTIFY THAT INFORMATION IN THIS APPLICATION IS TRUE AND CORRECT. WE HEREBY AUTHORIZE LSJ INSURANCE AGENCY TO SUBMIT THIS APPLICATION ON OUR BEHALF AND AUTHORIZE THE INSURANCE COMPANY IT REPRESENTS TO INVESTIGATE DIRECTLY, THROUGH TRADE CREDIT REPORTING COMPANIES, AND THROUGH CONSUMER CREDIT REPORTING AGENCIES ANY INFORMATION PERTAINING TO THIS COMPANY AND/OR THE INDIVIDUALS INVOLVED IN THIS COMPANY. WE AUTHORIZE OUR BANKS, CREDITORS, AND SUPPLIERS TO RELEASE CREDIT HISTORY TO THE INSURANCE COMPANY. Signed and dated this _____ day of _____, 20_____

Print company name X _____ _____
(Contractor authorized representative) (Title)