



## *Agent Information*

Agency Name:

Agency Code:

Producer/CSR:

Phone:

Email:

New

Renewal

Policy Number:



**OBLIGEE INFORMATION - ALL FIELD ARE REQUIRED**

Obligee Legal Name:	Type of Obligee:	PRIVATE
Obligee Full Address:		PUBLIC

**BID APPLICATION INFORMATION - ALL FIELD ARE REQUIRED**

Bid Date:	Anticipated Start Date:
Estimated total amount of bid (expressed in USD):	Specific or Est. Completion Date:
Bid Bond percentage (%) or flat amount:	Current work-on hand before starting this project (backlog amount):
Liquidated Damages per day (expressed in USD):	
Additional project details:	

**PERFORMANCE & PAYMENT BOND APPLICATION - ALL FIELD ARE REQUIRED**

Contract Date:	Contract Amount (expressed in USD):
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Engineer's Estimate (if provided- expressed in USD):

How was this bid secured:

Awarded the Low bid  
If Yes, did JM Wilson provide the bid bond and what were the top three bids?

Cashier's Check  
If Yes, what amount?

Obligee approached us directly to perform the job without a bid bond or check

Has the contractor completed jobs with this obligee before? If so, please provide the total amount (expressed in USD):

Anticipated Start Date:	Estimated Completion Date:
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Largest job completed in the past 36 months (expressed in USD):

Liquidated Damages per day (expressed in USD- if applicable):

Workmanship Guarantee/Maintenance/Warranty Period (expressed in months):

**Description of Work:**

Job Description (Title) & Address:

Amount of Bonded Backlog prior to beginning this job (expressed in USD):

Percentage of job being sub-contracted:     %

Please list sub-contractors on this job:

Was a contract provided by the obligee?  
If Yes, please submit with this application.

Is there any owner-specified bond forms that the Performance and/or Payment bonds must be issued on?  
If Yes, please attach the specified forms with this application.

Does this job involve work with any hazardous substances or materials? (i.e. asbestos, toxic waste removal, etc.)  
If Yes, provide details.

Current Work on Hand (Applicable for jobs over \$500,000):

LIST THE FIVE LARGEST PROJECTS THAT YOU'VE WORKED IN THE PAST 5 YEARS:

OWNER NAME	ADDRESS	JOB DESCRIPTION + LOCATION	CONTRACT PRICE	GROSS PROFIT	YEAR COMPLETED	PERCENT COMPLETED	WAS THIS JOB BONDED? (Y OR N)

FINANCE QUESTIONNAIRE

When is your Fiscal Year End?

Name of the CPA that prepares your financial statements:

Address of the CPA that prepares your financial statements:

Has a CPA compiled, Reviewed, and/or Audited your FYE corporate financials in the past three years? Yes      No  
 If yes, please attach a copy.

Which method is used in recording your financials?

- Cash                                      Accrual
- Completed contract                  Percentage of Completion

At which financial institution have you established a Form Line of Credit (if applicable):

Financial Institution Name:

Address:

Credit Line Amount:

Collateral:

Please list any additional financial institutions in which you have established a Form Line of Credit:

LEADERSHIP/EXECUTIVE/MANAGEMENT QUESTIONNAIRE

Is there a Buy-Sell Agreement in effect? Yes No  
 If yes, please attach a copy. If not, please attach a full explanation of continuity arrangements.

Are there any trust agreements in effect? Yes No  
 If yes, please attach a copy.

If yes, does this trust now hold, or will hold at some future date, any of the company stock or assets? Yes      No

Do you bond subs? Yes No

Have you or any officer, partner, stockholder, and/or principal ever been associated with a company which has failed to complete a contract, caused a surety a loss, failed in business, and/or compromised a creditor? Yes      No  
 If yes, please attach a full explanation.

Are you presently involved in any litigation, personal and/or corporate? Yes      No  
 If yes, please attach a full explanation.

