



[@ccisurety.com](http://ccisurety.com) ★ [www.ccisurety.com](http://www.ccisurety.com) ★ 8 .3 . 94 ph ★ 3. . fax

## GET STARTED:

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**Questionnaire and Signed Credit Release (included)**

**Most Up To Date Financial Information Available, Current and End of Year (in-house or CPA Prepared)**

**Personal Financial Statements for All Owners**

**Bond Request Form (if final bond is needed)**

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### MAY BE REQUIRED TO COMPLETE UNDERWRITING AFTER INITIAL REVIEW

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(PROVIDE ALL INFORMATION WHEN AVAILABLE OR AT UNDERWRITER'S REQUEST)

**Copy of Contract (if final bond is needed)**

**Bank reference letter**

**Resumes for all owners and key personnel**

**Work on hand schedule**

**Current Certificate of Insurance**

**Last three fiscal year-end financial statements**

**Business Plan**

Do not hesitate to contact CCI Surety with any questions. All items may not apply in every situation.

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<b>1. CONTRACTOR INFORMATION</b>		Company Name (As Appears on Bond)					
Company Address:					Business Phone # :		
City:	State:	Zip:	Normal Operating Territory:		FED ID #		
Proprietorship	Partnership	Joint Venture	Date Formed	Current Ownership Since:	Approx. Business Net Worth:	# of Employees	
S-Corp	C-Corp	LLC					
Type of work:		Largest Completed Contract:	Largest Completed Program:	Average Annual Receipts (last 3 yrs + affiliates)			
Previous Surety:		Reason For Changing Surety:					

<b>2. PROJECT INFORMATION</b>		Contract/Bid Amount:		Bid and Date Time :		Bid % :	
Project Owner/ Obligee:			Start Date:	Completion Date:	Maintenance Period:	Liquidated Damages:	
Obligee Address:				Obligee Contact For Bonds:		Obligee Phone:	
Bond Form (Please Attach)		% Subcontracted:	% Materials:	Est. Gross Profit:	Obligee Email:		
AIA	Federal	Other					
Job Description							

<b>3. *FINAL BONDS ONLY* BID SPREAD INFORMATION – (next 3 contractor bids, Name – Bid Amount)</b>	
1.	\$
2.	\$
3.	\$

<b>4. BANK NAME</b>		Line of Credit Limit:	Current Outstanding:	Expiration/Renewal Date:
Contact Name:				
Phone or Email:				

<b>5. LARGEST COMPLETED PROJECTS IN LAST 5 YEARS</b>					
<b>Project Name:</b> Project Description:		Contract Amount:	Gross Profit:	Completion Year:	Bonded? Yes No
Obligee:	Contact:	Phone/Email:		Project Location (City/State):	
<b>Project Name:</b> Project Description:		Contract Amount:	Gross Profit:	Completion Year:	Bonded? Yes No
Obligee:	Contact:	Phone/Email:		Project Location (City/State):	
<b>Project Name:</b> Project Description:		Contract Amount:	Gross Profit:	Completion Year:	Bonded? Yes No
Obligee:	Contact:	Phone/Email:		Project Location (City/State):	

