

To: <Client>
<Contractor>
<Address>
<City, State, Zip>

Date: <DATE>

Re: Checklist for Bond Application

Dear <FirstName>,

Attached please find our Contractors Surety Questionnaire that will need to be completed. Below please find a checklist to assist in your submission. Should you should have any questions, please feel free to contact us.

Complete pages 1 thru 7 of the Contractors Questionnaire.

- Copy of current General Liability Certificate.
- Copy of current Workman's Comp. Insurance Certificate.
- Copy of Contractors License or Assumed Certificate.
- Personal Financial Statements and Résumé's on Owners, Foreman & Superintendent, etc.
- Letters of recommendation from Suppliers, Sub Contractors, Banks, past jobs etc. In order to help you obtain these references, enclosed are sub-contractor and supplier reference forms and a performance evaluation form. Please submit these to as many companies as you can. This will establish the experience level of your company.
- Complete copies of the last two years Company Financial Statement including Balance Sheet and Profit & Loss prepared by a CPA, OR complete copy of last two years business tax return with all schedules attached.
- Personal Tax Statements for the last two years (first 2 pages only).
- Corporation papers along with certificate of good standing from issuing state.

There is a one-time underwriting fee of \$750.00 for all new accounts.

Sincerely,