

# BondPro, Inc.

217 S.E. Choctaw  
Bartlesville, OK. 74003

Phone: 918-337-4100  
Fax: 918-337-4101

## Contractor's Questionnaire

Company Name: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Fed. ID #: \_\_\_\_\_  
Year Started: \_\_\_\_\_ Structure: Proprietorship  Partnership  LLC  C-Corp   
Contractor's Lic. No. \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Class of Lic. \_\_\_\_\_  
Construction Specialties: \_\_\_\_\_  
Geographic Area of Operation: \_\_\_\_\_  
What % of the firm's work performed as: Prime? \_\_\_\_\_ Subcontractor? \_\_\_\_\_  
What % of the firm's work performed as: Public Work? \_\_\_\_\_ Private Work? \_\_\_\_\_  
What trades are subcontracted? \_\_\_\_\_  
What trades are done by your labor force? \_\_\_\_\_  
Is the firm union? Yes  No  Are you SBA 8(a) certified? Yes  No   
Number of Employees? \_\_\_\_\_ Number of Crews? \_\_\_\_\_

### Organization

List all subsidiaries and/or affiliates of the firm:

Name	Ownership	Type of business	Cross-indemnify?
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>

List the officers, partners or owners of the Company:

1. Name: \_\_\_\_\_ Position: \_\_\_\_\_ Ownership%: \_\_\_\_\_  
SS# \_\_\_\_\_ D.O.B. \_\_\_\_\_ Spouse: \_\_\_\_\_ SS# \_\_\_\_\_  
Home Address: \_\_\_\_\_  
2. Name: \_\_\_\_\_ Position: \_\_\_\_\_ Ownership%: \_\_\_\_\_  
SS# \_\_\_\_\_ D.O.B. \_\_\_\_\_ Spouse: \_\_\_\_\_ SS# \_\_\_\_\_  
Home Address: \_\_\_\_\_  
3. Name: \_\_\_\_\_ Position: \_\_\_\_\_ Ownership%: \_\_\_\_\_  
SS# \_\_\_\_\_ D.O.B. \_\_\_\_\_ Spouse: \_\_\_\_\_ SS# \_\_\_\_\_  
Home Address: \_\_\_\_\_  
4. Name: \_\_\_\_\_ Position: \_\_\_\_\_ Ownership%: \_\_\_\_\_  
SS# \_\_\_\_\_ D.O.B. \_\_\_\_\_ Spouse: \_\_\_\_\_ SS# \_\_\_\_\_  
Home Address: \_\_\_\_\_

Do any of the above have a Family Trust? No  Yes  If yes, provide copy.

Is there a Buy/Sell Agreement among the owners? No  Yes

Has the Company or any of its Owners petitioned for bankruptcy, failed in business or defaulted so as to cause a loss to a surety? No  Yes  If yes, attach explanation.

Is the Company or any of its Owners currently involved in litigation? No  Yes

If yes, explain: \_\_\_\_\_

Company Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

List the key personnel of your firm (can include officers, owners, managers, superintendents, project managers, estimators and others). (Attach resumes, if available)

Name	Year Hired	Current Position	DOB	# yrs experience	Summary of education, work experience

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List any life insurance in effect on key personnel:

1. Name: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Amount: \$ \_\_\_\_\_ Cash Value: \$ \_\_\_\_\_ Insurance Company: \_\_\_\_\_  
2. Name: \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Amount: \$ \_\_\_\_\_ Cash Value: \$ \_\_\_\_\_ Insurance Company: \_\_\_\_\_

Accounting

Bookkeeper or in-house accountant: \_\_\_\_\_ In-house software: \_\_\_\_\_  
Your CPA firm: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Basis of Tax preparation? %Completion  Completed Contract  Accrual  Cash   
Basis of F/S preparation? %Completion  Completed Contract  Accrual  Cash   
How often are F/S prepared (Annual, Semi-Annual, Quarterly), and at what level of assurance?  
CPA audit \_\_\_\_\_ CPA review \_\_\_\_\_ CPA compiled \_\_\_\_\_ Internal \_\_\_\_\_  
Are job costs tied to the General Ledger? No  Yes  How often updated? \_\_\_\_\_  
Is estimate compared to actual costs/quantities? No  Yes  How often? \_\_\_\_\_  
Have there been any major changes in financial condition since the most recent financial statement with respect to the following (please provide details)?  
 Ownership \_\_\_\_\_  
 Withdrawals \_\_\_\_\_  
 Major loans/refinancing \_\_\_\_\_  
 Major purchases/leases \_\_\_\_\_  
 Other \_\_\_\_\_

Bonding

Name of current surety: \_\_\_\_\_  
How long with current surety: \_\_\_\_\_ Reason for changing? \_\_\_\_\_  
Is collateral on deposit with any prior surety? No  Yes  Type/Amount \$ \_\_\_\_\_  
Has your firm been refused a bond by current or prior surety? No  Yes  If yes, explain: \_\_\_\_\_  
Bond Credit desired: Single Job \$ \_\_\_\_\_ Work Program \$ \_\_\_\_\_

Banking

Bank Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_  
Line of Credit: No  Yes  Amount: \$ \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
How secured? \_\_\_\_\_ Amt. of line currently in use? \$ \_\_\_\_\_

Insurance

List Insurance Coverages currently in place:

Coverage	Single Limit	Aggregate Limit	Carrier	Expiration Date

References

List four of your major suppliers:

Name	Address	Contact	Phone

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List four subcontractors (or General/Primes if you are a Sub) that you do business with:

1.	Name:		Phone:	
	Address:		Contact:	
2.	Name:		Phone:	
	Address:		Contact:	
3.	Name:		Phone:	
	Address:		Contact:	
4.	Name:		Phone:	
	Address:		Contact:	

Largest job completed? \$ \_\_\_\_\_ Job Experience Year completed: \_\_\_\_\_  
 Largest backlog (cost to complete) at one time: \$ \_\_\_\_\_ Year: \_\_\_\_\_

List five of your largest contracts:

1.	Job description:			
	Location:	Completion Date:	Bonded?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Final Contract Price:		Final Gross Profit:	
	Owner:	Contact:	Phone:	
2.	Job description:			
	Location:	Completion Date:	Bonded?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Final Contract Price:		Final Gross Profit:	
	Owner:	Contact:	Phone:	
3.	Job description:			
	Location:	Completion Date:	Bonded?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Final Contract Price:		Final Gross Profit:	
	Owner:	Contact:	Phone:	
4.	Job description:			
	Location:	Completion Date:	Bonded?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Final Contract Price:		Final Gross Profit:	
	Owner:	Contact:	Phone:	
5.	Job description:			
	Location:	Completion Date:	Bonded?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Final Contract Price:		Final Gross Profit:	
	Owner:	Contact:	Phone:	

Certification: I certify that all information is complete and correct, and is given to induce the surety to execute surety bonds. I understand that false information may constitute misrepresentation or fraud. I authorize the surety to obtain credit information and to make such other investigations as it deems necessary to underwrite this application.

Contractor: \_\_\_\_\_  
 By: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Date: \_\_\_\_\_