

CONTRACTORS BEST INSURANCE SERVICES, INC.

Bid, Performance and Payment Bonds

Submission Requirements

- 1) Contractors Questionnaire (*Form Attached, please fill out completely, sign and return*)
- 2) Business Bank Reference Letter (*Form Attached. Please forward directly to your banker to complete and return to our office*) – OR current business bank, investment and line of credit statements.
- 3) CPA Prepared Business Financial Statements for the past three (3) years – If CPA are not available the following will be needed:
 - a. Year End In-House Business Financial Statements for the past three (3) years – *include Balance Sheet, Profit & Loss Statement, Aging of Accounts Receivable & Aging of Accounts Payable*
 - b. AND/OR Complete Business Tax Returns for the past three (3) years
- 4) Current Interim Business Financial Statement (In-House or CPA prepared)
- 5) Current Personal Bank & Investment Statements
- 6) Personal Financial Statement for each owner (*Form Attached if needed*)
- 7) Current Work on Hand Schedule (*Form Attached*)
- 8) Blanket Credit Authorization Letter (*Form Attached*)
- 9) Resume of all key personnel/owners (*Form Attached if needed*)
- 10) Copy of Contractors State License
- 11) Proof of General Liability and Workers Compensation Insurance

If/When you have a project the following is needed:

- 12) Bid Bond Or Performance Payment Bond Request Form
- 13) Cost Breakdown
- 14) Job Description / Scope of work
- 15) Copy of the Contract (signed or unsigned)
- 16) Bond Forms
- 17) Bid Results (if available)

If you have any questions, please feel free to call at any time!

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