Registered Client with EasyPath BondLine --Large Contract Bond Request

⬆   🗒 My Account Profile   📇 New Bond Request   📑 Bond List   📤 Message Agent   💬 Account Discussions

✏ Bond Line   📋 Work on Hand (WOH)   📊 Work in Progress (WIP)

Select the Bond Category

◉ **Commercial Bond**
     Example: Contractor License, Motor Vehicle, Retail & Professional Services, etc.

◉ **Contract Bond**
     Example: Construction or service contracts requiring bid and performance bonding

[Next >>]

Registered Client with EasyPath BondLine --Large Contract Bond Request

⬆   📇 My Account Profile   📇 New Bond Request   📄 Bond List   💬 Message Agent   💬 Account Discussions

🖌 Bond Line   📄 Work on Hand (WOH)   📊 Work in Progress (WIP)

Select the Bond Category

◯ **Commercial Bond**
    Example: Contractor License, Motor Vehicle, Retail & Professional Services, etc.

⦿ **Contract Bond**
    Example: Construction or service contracts requiring bid and performance bonding

Bond Type: Tender Bond   ▽

Note: Your company has Active "Bond Facility Terms" for small Contracts
Refer available WOH and Current WIP

Bid Bond And/or Consent of Surety Bond

Contract Price: $ 1,000,000.00

Bond %   % 50

Bond Amount: $ 500,000.00   [Next >>]

Registered Client with EasyPath BondLine --Large Contract Bond Request

🔼   📋 My Account Profile   📑 New Bond Request   📋 Bond List   💬 Message Agent   💬 Account Discussions

🖋 Bond Line   📋 Work on Hand (WOH)   📗 Work in Progress (WIP)

Select the Bond Category

◉ **Commercial Bond**
     Example: Contractor License, Motor Vehicle, Retail & Professional Services, etc.

◉ **Contract Bond**
     Example: Construction or service contracts

Bond Type: | Tender Bond | ▼ |

Note: Your company has Active "Bond Facility Ter...
Refer available WOH and Current WIP

Bid Bond And/or Consent of Surety Bond

Contract Price: $ 1,000,000.00

Bond %   % 50

Bond Amount: $ 500,000.00

[Next >>]

Upgrading the Bond Facility Terms

     Note: Your company has Active "Bond Facility Terms" for small Contracts Refer available WOH and Current WIP

     Your request for Large Contract bond will initiate a request for higher Bond Facility Terms with the current request of Contract Bond

[Ok to Proceed] [Cancel]

Registered Client with EasyPath BondLine --Large Contract Bond Request

My Account Profile   New Bond Request   Bond List   Message Agent   Account Discussions

Bond Line   Work on Hand (WOH)   Work in Progress (WIP)

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

Contractor Questionnaire

Federal Tax ID (EIN):	[ ] *
State of Incorporation:	--- Please Select --- *
How many people does your company employ?	--- Please Select --- *
How many work crews do you have?	[ ] *
What is your estimated annual revenue next year?	$ [ ] *
What percentage of work do you normally sub out? ❓	% [ ] *
What was your largest amount of uncompleted work on hand and when?	$ [ ] * --- Please Select ---
How often are job costs reviewed?	--- Please Select --- *
Do the owners have a buy/sell agreement?	○ Yes ○ No *
Is the buy/sell agreement funded by life insurance?	○ Yes ○ No *
Do you have a full time accountant on staff?	○ Yes ○ No *
Is your company unionized?	○ Yes ○ No *
Do you lease equipment?	○ Yes ○ No *
Are Bonds required of subs?	○ Yes ○ No *
Are job cost records kept?	○ Yes ○ No *

CPA Information

CPA Firm Name:	[ ] *
Contact Name:	[ ] *
Contact Phone:	🇺🇸 ▾ (201) 555-5555 *
Fiscal Yearend	Month ▾ * [▾] *
On what basis are your taxes paid?	--- Please Select --- *
How are your financial statements prepared?	--- Please Select --- *
How often are your financial statements prepared?	--- Please Select --- *

Bank Information

Name:	BankName ✓
Branch Address:	[ ] *
Branch Zip Code:	[ ] *

Bank Information

Name:	BankName ✓
Branch Address:	[ ] *
Branch Zip Code:	[ ] *
Contact Name:	[ ] *
Contact Phone:	🇺🇸 ▾ (201) 555-5555 *
Do you have a Line of Credit?	○ Yes ○ No *

Contractor Questionnaire:

- Accuracy and completeness of information are imperative and will expedite the process.
- Please enter all mandatory (*) fields before proceeding.
- Some questions require additional details. New data entry fields will show up.
- The Bond Request Process Bar at the top of the page indicates the current step.
- Completed steps are green while incomplete steps are grey.
- You can return to any previously completed steps as needed.

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

↑ 📄 My Account Profile   📝 New Bond Request   📋 Bond List   🔔 Message Agent   💬 Account Discussions

🔧 Bond Line   🏠 Work on Hand (WOH)   📗 Work in Progress (WIP)

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

Contractor Questionnaire

Federal Tax ID (EIN):	12121212 ✓
State of Incorporation:	District of Columbia ✓
How many people does your company employ?	1-5 ✓
How many work crews do you have?	5 ✓
What is your estimated annual revenue next year?	$ 1,000,000.00 ✓
What percentage of work do you normally sub out?	% 10.00 ✓
What was your largest amount of uncompleted work on hand and when?	$ 50,000.00 ✓ 1968 ✓
How often are job costs reviewed?	Annually ✓
Do the owners have a buy/sell agreement?	○ Yes ◉ No ✓
Is the buy/sell agreement funded by life insurance?	○ Yes ◉ No ✓
Do you have a full time accountant on staff?	○ Yes ◉ No ✓
Is your company unionized?	○ Yes ◉ No ✓
Do you lease equipment?	○ Yes ◉ No ✓
Are Bonds required of subs?	○ Yes ◉ No ✓
Are job cost records kept?	○ Yes ◉ No ✓

CPA Information

CPA Firm Name:	CPAName Ltd ✓
Contact Name:	CPA Name ✓
Contact Phone:	🇺🇸 ▾ (201) 555-5555 ✓
Fiscal Yearend	January ✓ 31 ✓
On what basis are your taxes paid?	Accrual ✓
How are your financial statements prepared?	CPA Audit ✓
How often are your financial statements prepared?	Annually ✓

Bank Information

Name:	BankName ✓
Branch Address:	Address1 ✓
Branch Zip Code:	22222 ✓
	ARLINGTON, VA, United States
Contact Name:	BankManager ✓
Contact Phone:	🇺🇸 ▾ (201) 555-5555 ✓
Do you have a Line of Credit?	○ Yes ◉ No ✓

Contractor Questionnaire:

- Accuracy and completeness of information are imperative and will expedite the process.
- Please enter all mandatory (*) fields before proceeding.
- Some questions require additional details. New data entry fields will show up.
- The Bond Request Process Bar at the top of the page indicates the current step.
- Completed steps are green while incomplete steps are grey.
- You can return to any previously completed steps as needed.

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

What bond companies have you used in the past?

Surety: **Reason for leaving:**

--- Please Select --- ✶   ✶

Add Surety: ✚

Sub-contractor References (or contractors if you are a sub):

Sub-Contractor: **Contact Name:**   **Contact Phone:**

✶   ✶   🇺🇸 ▾ (201) 555-5555 ✶

Add Sub-Contractor Reference: ✚

Supplier References:

Supplier: ✶   **Line of Credit Amount:** $ ✶

Contact Name: ✶   **Contact Phone:**   🇺🇸 ▾ (201) 555-5555 ✶

Add Supplier Reference: ✚

Job References:

Owner or General Contractor: ✶

Job Description: ✶

Contact Name: ✶   **Completion Date:**   📅 MM/DD/YYYY ✶

Contact Phone: 🇺🇸 ▾ (201) 555-5555 ✶   **Bonded:**   ◯ Yes ◯ No ✶

Zip Code: ✶   **Final Contract Price:** $ ✶

Country: **Final Gross Profit:** $ ✶

Add Job Reference: ✚

Next >>

Reference Details:

- References are required for at least one owner.
- Strong references increase the likelihood of successful bond requests.
- Once your resume and references are on file, it expedites future requests.

Have Questions or Need Help?

Call your representative:
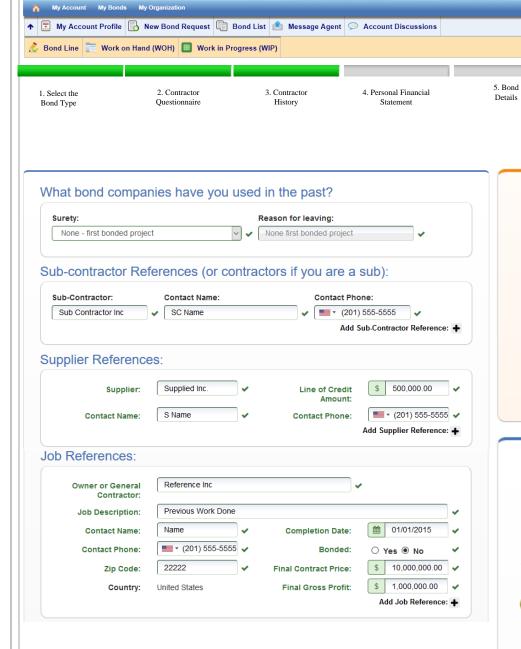
🏢 **Agency:** AB

📞 **Main Line:** (201) 555-5555

Contract Bonds:

👤 **Agency Rep:** EasyPath SM59

📞 **Call Me Please**

Registered Client with EasyPath BondLine --Large Contract Bond Request

My Account Profile   New Bond Request   Bond List   Message Agent   Account Discussions

Bond Line   Work on Hand (WOH)   Work in Progress (WIP)

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

What bond companies have you used in the past?

Surety:
None - first bonded project ✔

Reason for leaving:
None first bonded project ✔

Sub-contractor References (or contractors if you are a sub):

Sub-Contractor: Sub Contractor Inc ✔
Contact Name: SC Name ✔
Contact Phone: (201) 555-5555 ✔

Add Sub-Contractor Reference: ✚

Supplier References:

Supplier: Supplied Inc. ✔
Contact Name: S Name ✔
Line of Credit Amount: $ 500,000.00 ✔
Contact Phone: (201) 555-5555 ✔

Add Supplier Reference: ✚

Job References:

Owner or General Contractor: Reference Inc ✔
Job Description: Previous Work Done ✔
Contact Name: Name ✔
Contact Phone: (201) 555-5555 ✔
Zip Code: 22222 ✔
Country: United States
Completion Date: 01/01/2015 ✔
Bonded: ○ Yes ● No ✔
Final Contract Price: $ 10,000,000.00 ✔
Final Gross Profit: $ 1,000,000.00 ✔

Add Job Reference: ✚

Next >>

Reference Details:

- References are required for at least one owner.
- Strong references increase the likelihood of successful bond requests.
- Once your resume and references are on file, it expedites future requests.

Have Questions or Need Help?

Call your representative:

🏢 **Agency:** AB
📞 **Main Line:** (201) 555-5555

Contract Bonds:

👤 **Agency Rep:** EasyPath SM59

📞 Call Me Please

Registered Client with EasyPath BondLine --Large Contract Bond Request

⬆ 📇 **My Account Profile**   📄 **New Bond Request**   📋 **Bond List**   💬 **Message Agent**   💬 **Account Discussions**

🖊 **Bond Line**   📊 **Work on Hand (WOH)**   📗 **Work in Progress (WIP)**

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

Annual Income for FirstName Name

Source of Income: **Amount:**

--- Please Select --- ▼ 🖱 * $ [   ] *

Total Income: $0.00/Year   Add Income: ➕

Own any real estate?   ◉ Yes ○ No   ✔

Real Estate Schedule of FirstName Name

Description: [   ] *   **Purchase Price:** $ [   ] *

Mortgage Balance: $ [   ] *   **Market Value:** $ [   ] *

Date Acquired: 📅 MM/DD/YYYY *   **Mortgage Maturity:** 📅 MM/DD/YYYY

Add Real Estate: ➕

Assets of FirstName Name

Asset Type: **Amount:**

Real Estate ▼ ✔ $ [   ]
Please enter real estate details in schedule above.

--- Please Select --- ▼ * $ [   ] *   ➖

Total Assets: $0.00   Add Asset: ➕

Liabilities of FirstName Name

Liability Type: **Amount:**

Real Estate Loans ▼ ✔ $ [   ]
Please enter real estate details in schedule above.

--- Please Select --- ▼ * $ [   ] *   ➖

Total Liabilities: $0.00   Add Liability: ➕

Net Worth of FirstName Name

Total Assets:	$0.00
Total Liabilities:	$0.00
Net Worth:	$0.00

Personal Financial Statement Instructions:

- Complete all sections as accurately as possible.
- An underwriter may ask for verification of assets.
- All individuals listed must provide their personal financial statement to continue.
- All information is transmitted securely using an EV SSL encrypted connection.

Have Questions or Need Help?

Call your representative:

🏢 **Agency:** AB

📞 **Main Line:** (201) 555-5555

Contract Bonds:

👤 **Agency Rep:** EasyPath SM59

📞 **Call Me Please**

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

1. Select the Bond Type	2. Contractor Questionnaire	3. Contractor History	4. Personal Financial Statement	5. Bond Details	6. Contract Details	7. Bond Quote

Annual Income for FirstName Name

Source of Income: **Amount:**

Bonus & Commissions ✔ $ 100,000.00 ✔

Total Income: $100,000.00/Year   Add Income: ➕

Own any real estate?   ⦿ Yes ◯ No   ✔

Real Estate Schedule of FirstName Name

Description: Home ✔   **Purchase Price:** $ 1,000,000.00 ✔

Mortgage Balance: $ 500,000.00 ✔   **Market Value:** $ 1,500,000.00 ✔

Date Acquired: 📅 01/01/2002 ✔   **Mortgage Maturity:** 📅 01/01/2020

Add Real Estate: ➕

Assets of FirstName Name

Asset Type: **Amount:**

Real Estate ✔ $ 1,500,000.00 ✔
Please enter real estate details in schedule above.

Business Entities ✔ $ 500,000.00 ✔   ➖

Total Assets: $2,000,000.00   Add Asset: ➕

Liabilities of FirstName Name

Liability Type: **Amount:**

Real Estate Loans ✔ $ 500,000.00 ✔
Please enter real estate details in schedule above.

Personal Loans ✔ $ 100,000.00 ✔   ➖

Total Liabilities: $600,000.00   Add Liability: ➕

Net Worth of FirstName Name

Total Assets: $2,000,000.00
Total Liabilities: $600,000.00
Net Worth: $1,400,000.00

Personal Financial Statement Instructions:

- Complete all sections as accurately as possible.
- An underwriter may ask for verification of assets.
- All individuals listed must provide their personal financial statement to continue.
- All information is transmitted securely using an EV SSL encrypted connection.

Have Questions or Need Help?

Call your representative:

🏢 **Agency:** AB

📞 **Main Line:** (201) 555-5555

Contract Bonds:

👤 **Agency Rep:** EasyPath SM59

📞 **Call Me Please**

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

| 1. Select the Bond Type | 2. Contractor Questionnaire | 3. Contractor History | 4. Personal Financial Statement | 5. Bond Details | 6. Contract Details | 7. Bond Quote |

Tell us about the bond you need!

Contract Bond Type: Bid Bond ✔

Legal Project Name: Test ✔

Contract / Project #: 156978 ✔

Contract Price: $ 100,000.00 ✔

Bond %: ❓ % 10.00 ✔

Bond Amount $: $10,000.00

Bond Form: Test for SMB-113 ✔

View Bond Form

Date & Time of Bid: 10/23/2018 04:31 PM 📅 ✔

Time Zone: Atlantic Daylight Time UTC - 3 hours

Do you need a consent of surety form? ○ Yes ● No ✔

Who is requiring the bond of you?

Obligee / Owner: Agency for Health Care Administration ✔

Address 1: 2727 Mahan Drive ✔

Address 2:

Zip Code: 32308 ✔

TALLAHASSEE, FL, United States

Describing the Job or Project:

- This is where you describe the job or project being bonded.
- Accuracy and completeness of information are imperative and will expedite the process.
- Future updates can be made through a maintenance module.
- The Bond Request Progress bar at the top of the page indicates the current step.
- Completed steps are green while incomplete steps are grey.
- You can return to any previously completed steps as needed.
- Please enter all mandatory (*) fields before proceeding.

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

| ⬆️ | 📋 My Account Profile | 📇 New Bond Request | 📄 Bond List | 📤 Message Agent | 💬 Account Discussions |

| 🔧 Bond Line | 📋 Work on Hand (WOH) | 📗 Work in Progress (WIP) |

| 1. Select the Bond Type | 2. Contractor Questionnaire | 3. Contractor History | 4. Personal Financial Statement | 5. Bond Details | 6. Contract Details | 7. Bond Quote |

Contract Details

Scope of Work:	Barriers ▼	✔
Description of Work:	MockUp Project	✔
Anticipated Start Date:	10/26/2018 📅	✔
Anticipated Completion Date:	10/26/2018 📅	✔
Date of Contract (proposed or actual date):	10/26/2018 📅	✔
Penalties / Damages for Delay:	$ 100.00 /Day	✔
Retainage / Holdback:	% 10.00	✔
Warranty / Maintenance Period:	12 Months	✔
Special Hazards:	⚪ Yes ⚫ No	✔

Job Location

Address 1:	Address	✔
Address 2:	Address	✔
Zip Code:	22222	✔
	ARLINGTON, VA, United States	
Distance from Job:	0-50 Miles ▼	✔

Job Cost Breakdown

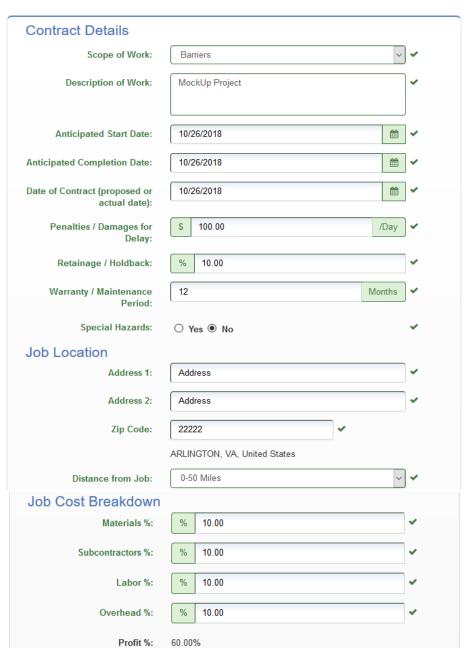|		
Materials %:	% 10.00	✔
Subcontractors %:	% 10.00	✔
Labor %:	% 10.00	✔
Overhead %:	% 10.00	✔
Profit %:	60.00%	

Describing the Job or Project:

- This is where you describe the job or project being bonded.
- Accuracy and completeness of information are imperative and will expedite the process.
- Future updates can be made through a maintenance module.
- The Bond Request Progress bar at the top of the page indicates the current step.
- Completed steps are green while incomplete steps are grey.
- You can return to any previously completed steps as needed.
- Please enter all mandatory (*) fields before proceeding.

Next >>

Registered Client with EasyPath BondLine --Large Contract Bond Request

| 1. Select the Bond Type | 2. Contractor Questionnaire | 3. Contractor History | 4. Personal Financial Statement | 5. Bond Details | 6. Contract Details | 7. Bond Quote |

Business Financial Statements

To qualify for the largest bond limits, the underwriter needs to review your financial condition.

It's important to provide CPA prepared financial statements if you have them, as they will provide you higher limits than with internal statements.

Resume - FirstName Name: [➕ Browse] ✱

Bank reference letter: [➕ Browse] ✱

Insurance certificate: [➕ Browse] ✱

[2017] Fiscal Yearend Statement: [➕ Browse] ✱

[2016] Fiscal Yearend Statement: [➕ Browse] ✱

[2015] Fiscal Yearend Statement: [➕ Browse] ✱

Important: Upload CPA prepared financial statements to qualify for the largest bond limits.

[**Submit Documents**]

Have Questions or Need Help?

Call your representative:

🏢 **Agency:** AB

📞 **Main Line:** (201) 555-5555

Contract Bonds:

👤 **Agency Rep:** SMB 59

[📞 Call Me Please]

DUMMY4LOGO