

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 >>

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 No Active “Bond Facility Terms”
This Bond Request will also initiate a request for “Bond Facility Terms” with this contract bond

Bid Bond And/or Consent of Surety Bond

Contract Price:

\$ 1,000,000.00

Bond %

% 50

Bond Amount:

\$ 500,000.00

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Welcome John

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1. Select the Bond Type

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5. Personal Financial Statement

6. Bond Details

7. Contract Details

8. Bond Quote

Answer on behalf of MockUp2

Primary work you do:

--- Please Select ---

Add Primary Work you do: +

Number of jobs in progress:

Answer on behalf of all owners & MockUp2

Ever failed or defaulted on a contract?

☐ Yes ☐ No

Ever been convicted of a felony or fraud?

☐ Yes ☐ No

Any active bonds with another surety?

☐ Yes ☐ No

Largest job previously completed

Final Contract Price:

\$

Date Completed:

MM/DD/YYYY

Final Gross Profit:

\$

Bank Information

Bank Name:

Full Bank Line Amount:

\$

Amount of Bank Line Available:

\$

Bank Line Expiration Date:

MM/DD/YYYY

Next >>

Have Questions or Need Help?

Call your representative:

Agency: AB

Main Line: (201) 555-5555

Contract Bonds:

Agency Rep: SMB 59

Call Me Please

DUMMY LOGO

Instructions:

- All information is transmitted securely using an EV SSL encrypted connection.
- Be sure to answer all questions accurately.
- Inaccurate information can result in retraction of bond offer or cancellation of bond.
- Intentional inaccurate information is considered **insurance fraud** under U.S. law.
- Your I.P. address is being recorded with each step of the application.

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1. Select the Bond Type
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8. Bond Quote

Answer on behalf of MockUp2

Primary work you do:

Barriers

Add Primary work you do: +

Number of jobs in progress:

1

Answer on behalf of all owners & MockUp2

Ever failed or defaulted on a contract? ☐ Yes ☒ No ✓Ever been convicted of a felony or fraud? ☐ Yes ☒ No ✓Any active bonds with another surety? ☐ Yes ☒ No ✓

Largest job previously completed

Final Contract Price: \$ 500,000.00 ✓

Date Completed: 01/01/2015 ✓

Final Gross Profit: \$ 200,000.00 ✓

Bank Information

Bank Name: BankName ✓

Full Bank Line Amount: \$ 500,000.00 ✓

Amount of Bank Line Available: \$ 50,000.00 ✓

Bank Line Expiration Date: 01/01/2020 ✓

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Call Me Please

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1. Select the Bond Type2. Quick Contractor Questionnaire3. Contractor Questionnaire4. Contractor History5. Personal Financial Statement6. Bond Details7. Contract Details8. 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

*

Next >>

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.

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Welcome John

My Account Profile

New Bond Request

Bond List

Message Agent

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8. 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.

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What bond companies have you used in the past?

Surety:

--- Please Select ---

Reason for leaving:

Add Surety: +

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

Sub-Contractor:

Contact Name:

Contact Phone:

+1 (201) 555-5555

Add Sub-Contractor Reference: +

Supplier References:

Supplier:

Line of Credit Amount:

\$

Contact Name:

Contact Phone:

+1 (201) 555-5555

Add Supplier Reference: +

Job References:

Owner or General Contractor:

Job Description:

Contact Name:

Completion Date:

MM/DD/YYYY

Contact Phone:

+1 (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

My Account My Bonds My Organization

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1. Select the Bond Type
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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. ✓

Line of Credit
Amount:

\$ 500,000.00 ✓

Contact Name:

S Name ✓

Contact Phone:

🇺🇸 (201) 555-5555 ✓

Add Supplier Reference: +

Job References:

Owner or General
Contractor:

Reference Inc ✓

Job Description:

Previous Work Done ✓

Contact Name:

Name ✓

Completion Date:

📅 01/01/2015 ✓

Contact Phone:

🇺🇸 (201) 555-5555 ✓

Bonded:

☐ Yes ☒ No ✓

Zip Code:

22222 ✓

Final Contract Price:

\$ 10,000,000.00 ✓

Country:

United States

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

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 Agency
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Annual Income for FirstName Name

Source of Income:
--- Please Select ---

Amount:
\$

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:
Real Estate

Amount:
\$

Please enter real estate details in schedule above.

--- Please Select ---

Total Assets: \$0.00

Add Asset: +

Liabilities of FirstName Name

Liability Type:
Real Estate Loans

Amount:
\$

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: (211) 555-5555

Contract Bonds:

Agency Rep: EasyPath SM59

Call Me Please

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Annual Income for FirstName Name

Source of Income:

Bonus & Commissions

Amount:

\$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:

Real Estate

Amount:

\$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:

Real Estate Loans

Amount:

\$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:

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- 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

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5. Personal Financial Statement

6. Bond Details

7. Contract Details

8. 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.
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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%

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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:

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 Main Line: (201) 555-5555

Contract Bonds:

Agency Rep: SMB 59

Call Me Please

