

contractor pre-bond submission checklist

AVOID DELAYS. GET APPROVED FASTER.



1: FINANCIAL DOCUMENTS

- Business Financial Statements
- Business Tax Returns
- Work-in-Progress (WIP)
- Schedule
- Current Backlog Report
- Bank Reference Letter
- Line of Credit Info
- CPA-Prepared Statements (Preferred)

2: COMPANY INFORMATION

- Legal Business Name
- Years in Business
- Contractor License Number
- Ownership Structure
- Management Experience
- Description of Services

3: PROJECT HISTORY

- Largest Completed Projects
- Current Projects
- Typical Contract Size
- Past Bonded Projects
- Owner / GC References
- Project Manager Resumes

4: INSURANCE DOCUMENTATION

- Certificate of Insurance
- General Liability
- Workers' Compensation
- Umbrella Coverage
- Builder's Risk (If Applicable)

5: OWNER INFORMATION

- Personal Financial Statement
- Credit Authorization
- Owner Resume
- Signed Indemnity Agreement

6: BONDING HISTORY

- Prior Surety Company
- Program Size / Limits
- Current Bonding Line
- Past Claims (If Any)



READY TO APPLY?

Submit your bond application at ZipBonds.com
support@zipbonds.com | (888) 435-4191