

Project Name: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Project Manager/Estimator: \_\_\_\_\_

Estimated Single Project Size: \$ \_\_\_\_\_

Firm Name: \_\_\_\_\_

DBA (if applicable): \_\_\_\_\_ Parent Company (if applicable): \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_ Phone #: \_\_\_\_\_

Federal Tax ID (FEIN) \_\_\_\_\_ Dun & Bradstreet # (if known) \_\_\_\_\_

Contact for C2M Inquiries: \_\_\_\_\_

Contact Email: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Contractor License #: \_\_\_\_\_ State: \_\_\_\_\_

**Bonding Information:**

Surety Company: \_\_\_\_\_ Agent Company: \_\_\_\_\_

Single Job Bonding Capacity: \$ \_\_\_\_\_ Aggregate Bonding Capacity: \$ \_\_\_\_\_

**\*\*\*Please Attach: Bond Rate Schedule and Surety Letter Dated within past 90 days\*\*\***

**General Information:**

# Years in business under current name: \_\_\_\_\_  
 # Years performing work trade: \_\_\_\_\_  
 Largest Prior Year Backlog in past 3 years: \$ \_\_\_\_\_  
 Current Cost to Complete Backlog: \$ \_\_\_\_\_  
 Annual Revenue last year: \$ \_\_\_\_\_  
 Average Annual Revenue over last 3 years: \$ \_\_\_\_\_

**Safety Information: Please input 5 years of TRIR & EMR**

Year	TRIR	EMR
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Type(s) of Subcontractor (Electrical, Mechanical, Concrete, Etc...): \_\_\_\_\_

**Management:**

Has your company undergone a change in ownership control by 20% or more in the past three years?   
 Yes  No    
 OR   
 If yes, please complete the following to include Name/Entity, Position, & Years with Firm. \_\_\_\_\_

Is there a plan in place for your company to undergo a change in control by 20% or more in the next three years?   
 Yes  No    
 If yes, please complete the following to include Name/Entity, Position, & Years with Firm. \_\_\_\_\_

**LARGEST CONTRACTS CURRENTLY IN PROGRESS:**

**Project 1**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Expected Completion Date: \_\_\_\_\_

**Project 2**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Expected Completion Date: \_\_\_\_\_

**Project 3**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Expected Completion Date: \_\_\_\_\_

**LARGEST COMPLETED PROJECTS (Within the last 5 years):**

**Project 1**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Completion Date: \_\_\_\_\_

**Project 2**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Completion Date: \_\_\_\_\_

**Project 3**

Project: \_\_\_\_\_ Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Contract Amount: \$ \_\_\_\_\_ Completion Date: \_\_\_\_\_

**Bank Reference**

Bank Name: \_\_\_\_\_ Address: \_\_\_\_\_  
Bank Line Capacity: \$ \_\_\_\_\_ Borrowings: \$ \_\_\_\_\_

**FINANCIAL STATEMENT:**

**\*Provide a copy of your two most recent years of CPA prepared year-end financial statements, supplemental schedules (i.e. Work in Progress & Completed Job Schedule), and Latest Internal Financial Statements\***

Firm that prepared statements: \_\_\_\_\_

**I hereby certify that the above information is accurate and complete to the best**

Signature: \_\_\_\_\_  
(Officer of firm)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date Completed: \_\_\_\_\_

