

992 Old Eagle School Road #915
 Wayne, PA 19087
 610 828 4240 Phone
 610 828 4415 Fax

ORGANIZATION AND BACKGROUND

1. Company Name: _____ Federal I.D. # _____
2. This company is a: Sole Proprietorship _____ Partnership _____ Corporation _____
3. How long in business: _____ If incorporated, incorporation date: _____ State: _____
4. Company address: _____
 City: _____ State: _____ Zip: _____ Phone: _____
5. List all Owners, Officers, and/or Partners of the Company: *(if additional room is needed, please use another sheet)*

Name	Address	Social Security Number	Date of Birth	% Interest

OPERATIONS

6. Type(s) of service provided: _____

7. Territory (present and planned): _____
8. Customer base: Who are your typical customers? _____

9. Does any one customer represent a significant concentration of your annual revenues? _____
10. Who are your major competitors? _____
11. Does your company typically use standardized contracts for the work it performs or is each contract negotiated on a case-by-case basis? *(please attach a copy of a standard or typical contract)* _____
12. What is the average, maximum, and minimum duration of your contracts? (six months, two years, etc.) _____
13. Describe your Normal Work Program (bonded and un-bonded jobs):
 Average job size: (From) \$ _____ (To) \$ _____
 Average total work on hand: (From) \$ _____ (To) \$ _____
14. Bonding capacity desired:
 Single bond: \$ _____ Total bond program: \$ _____
15. Largest contract completed to date (bonded or un-bonded): \$ _____

16. List five largest contracts completed in the last three years (bonded or un-bonded):

Owner	Kind of Work and Location	Term	Name and Phone Number of Person to Contact	Approximate Contract Price	Year Completed	Dispute Y/N

17. Name of current surety company. _____ Current Bond/Letter of Credit Rate: _____

DISPUTES AND LITIGATION

18. Describe what would constitute default under one of your typical contracts. _____

19. Has your firm ever defaulted on a contract? If yes, please attach explanation. _____

20. Is your firm or any of its Owners/Officers currently involved in any litigation? Yes/ No If yes, please attach explanation.

21. Have the Owners or Company ever declared bankruptcy? Yes/ No If yes, please attach explanation.

BANKING AND INSURANCE

22. Name and address of Bank: _____

23. Bank Officer and phone number: _____

24. Line of credit established: _____ Current portion borrowed: \$ _____

25. How is credit secured? _____ Renewal dates: _____

26. Is personal indemnity of the Owner(s), Stockholder(s), and spouse(s) available for bonding purposes? Yes/ No

ATTACHMENTS - please include the following with your application:

- A. The last three fiscal financial statements of the applicant and all related companies.
- B. Personal financial statements of owners.
- C. Copy of most recent Certificate of Insurance.
- D. Copy of standard contract and bond form if specific form required.
- E. Copy of any company brochures.

This questionnaire must be signed by an owner or officer of the company for which bonding is being requested.

The undersigned does hereby authorize Wharton Surety Consultants, LLC and/or its designated Surety to make inquiries as necessary concerning or pertaining to the undersigned's financial standing, credit, or manner of meeting obligations to verify the accuracy of the statements made and to determine credit worthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). A copy of this agreement shall be considered the same as the original. This authorization is to remain in full force until rescinded by the applicant in writing. These statements are made for the purpose of obtaining a bond. I understand false statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C. 1001).

_____ Date: _____
Name and Title