



Marsh & McLennan Agency, LLC
 1601 Belvedere Road, Suite 300
 East Tower
 West Palm Beach, FL 33406
 800.226.6268
 866.795.7527
 www.mma-fl.com

Please fax the completed form with any additional information to: 561-424-4313 or via email to dbelis@seitlin.com

Contractor's Surety Survey

Name of Firm (exactly as it appears on corp. seal or as used in general conduct of business if not incorporated)					
Address			Phone No.:	FAX No.:	
City	State	Zip Code	Type of Business <input type="checkbox"/> Corporation <input type="checkbox"/> Sub Chapter (S)	<input type="checkbox"/> LLC <input type="checkbox"/> Individual <input type="checkbox"/> Partnership	
Date Business Started:			State of Incorporation:		
Class of Contractor	<input type="checkbox"/> Builder <input type="checkbox"/> Highway	<input type="checkbox"/> Heavy Construction <input type="checkbox"/> Subcontractor	<input type="checkbox"/> Specialty <input type="checkbox"/> Other		

Corporate Officers-Stockholders-Partners-Proprietors

Name	Age	Position/Title	% of Ownership	Social Security Number	Marital Status

Will all of the above and their spouses personally indemnify surety? Yes No If no, please explain (attached separate sheet, if necessary):

Has your firm or any of its principals ever petitioned for bankruptcy, failed in business or defaulted so as to cause a loss to a surety? Yes No If Yes, please explain (attach separate sheet, if necessary):

Is your firm presently involved in any litigation: Yes No If Yes, please explain (attach separate sheet, if necessary):

Name of Present and Prior Sureties:

Agent:

Is the company or its owners connected with other companies as subsidiary, parent, holding or affiliate? Yes No If Yes, please explain (attach separate sheet, if necessary):

ACCOUNTING	When is your fiscal year end?	On what basis are taxes paid: <input type="checkbox"/> % of Completion <input type="checkbox"/> Cash <input type="checkbox"/> Completed Job <input type="checkbox"/> Subchapter S <input type="checkbox"/> Accrual <input type="checkbox"/> C Corporation
	On what basis are the financial statements prepared: <input type="checkbox"/> Cash <input type="checkbox"/> Completed Job <input type="checkbox"/> Accrual <input type="checkbox"/> % of Completion	
	Name and phone number of accounting firm :	How many years has this firm prepared your financial statement?
	Are individual job cost records prepared? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how often are they updated	

BANK	Name and Address of Bank:		
	Total Line of Credit	How Secured:	Interest Rate:
	Loan Officer & Phone No.:	Amount Currently Available:	





HISTORY	What is the largest amount of uncompleted work on hand at any one time?			
	Amount: \$		Year:	
	List the 5 Largest Projects Completed by your Company			
	Project	Contract Price	Date Completed	Gross Profit
REFERENCES	List 5 of your major Suppliers			
	NAME	ADDRESS	TELEPHONE	CREDIT MANAGER
	List 5 Owners (General Contractors if you are a Subcontractor) you have worked with in the last 2 years			
	COMPANY NAME	PROJECT	TELEPHONE	CONTACT



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GENERAL	Is your operation: <input type="checkbox"/> Union <input type="checkbox"/> Non-Union
	What size projects and total work program does your organization feel best able to handle? Single Job \$ _____ Total Program \$ _____
	Do you have a formal business plan? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please attach a copy.
	Is there a buy/sell agreement amount the owners of the business? <input type="checkbox"/> Yes <input type="checkbox"/> No. If yes, please attach a copy.
	Is this agreement funded by life insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No.
	What percentage of the firms work is normally for: Government Agencies - ____% Private Owners - ____%
	What percentage of the firms work is normally subcontracted: ____%. Are subs normally bonded <input type="checkbox"/> Yes <input type="checkbox"/> No.
	What trades are normally subcontracted?
	What trades do you normally self perform?
	Please attach a current Certificate of Insurance

I/We authorize Seitlin, A Marsh & McLennan Agency LLC Company and Surety Companies to investigate my statements and to check my/our credit with any creditors or lending institutions.

Signed this _____ day of _____, _____

Signature

Name and Title

