



PLATINUM BONDS

### Contract Application (short form)

#### CONTRACTOR DATA

Type of Business:  Partnership  (S) Corporation  (C) Corporation  Sole Proprietorship  LLC  LLP  
 Company Name \_\_\_\_\_ Phone \_\_\_\_\_  
 Company Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Type of Work \_\_\_\_\_ Date started in Business \_\_\_\_\_  
 Underwriting File Number  Yes  No

#### OWNER DATA/ INDEMNITORS

(Provide the information below on all owners; use additional sheet if necessary)

Name _____	Name _____
Address _____	Address _____
City/State/Zip _____	City/State/Zip _____
SS# _____ DOB _____	SS# _____ DOB _____
% of Business Ownership _____ Married <input type="checkbox"/> Yes <input type="checkbox"/> No	% of Business Ownership _____ Married <input type="checkbox"/> Yes <input type="checkbox"/> No
Spouse Name _____	Spouse Name _____
SS# _____ DOB _____	SS# _____ DOB _____

\*\*\*For new applicants, complete and sign the General Indemnity Agreement on page 3.\*\*\*

#### BOND REQUEST DATA

Anticipated Start Date \_\_\_\_\_ Time for Completion \_\_\_\_\_ Maintenance Period \_\_\_\_\_  
 Obligee (Who is requiring the contractor get a bond?) \_\_\_\_\_  
 Obligee Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Job Description \_\_\_\_\_

*\*This application is not intended for use in connection with Subdivision or Site Improvement over \$100,000, Asbestos Abatement, Completion, Hazardous Materials, or Multi-Year Contracts.*

**Check and Complete:** (For private jobs or subcontracts, please enclose a copy of the contract and bond form for projects over \$50,000.)  
 (check one only) (For service type contracts, provide a copy of the contract.)

**Bid Bond:**  
 Bid date \_\_\_\_\_  
 Estimated total amount of bid: \$ \_\_\_\_\_  
 Bid Bond % or flat amount \_\_\_\_\_

**OR** Contract Price \$ \_\_\_\_\_  
 Contract Date (Date when contract is signed) \_\_\_\_\_  
 **Performance & Payment Bond**  **Supply Bond**  
 **Subcontractor Performance & Payment Bond**  
 **Stand Alone Maintenance Bond \$** \_\_\_\_\_  
 (Send obligee verification that work was completed satisfactorily.)  
 Next two lowest bidders (If truly negotiated, check box)   
 \$ \_\_\_\_\_ \$ \_\_\_\_\_

**Status of Outstanding Bid or Performance Bonds:**  
 Bond No. \_\_\_\_\_ Bid Awarded:  Yes  No  
 Bond No. \_\_\_\_\_ Bid Awarded:  Yes  No

#### BOND FORM DATA

Obligee Form  AIA Form  State Form  Federal Contract # \_\_\_\_\_  
 (Send copy for review) (Send copy for review) State of Incorporation \_\_\_\_\_

Name of Licensed Agent who will sign the bond for this job \_\_\_\_\_

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Platinum Bonds Insurance Agency	15615 Alton Parkway, Suite 450 Irvine CA 92618
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Toll Free Phone (866) 409-2477	Website <a href="http://www.PlatinumBonds.com">www.PlatinumBonds.com</a>
Toll Free Fax (866) 299-6242	e-Mail: <a href="mailto:CustomerService@PlatinumBonds.com">CustomerService@PlatinumBonds.com</a>
CA License Number 0E75926	

Contractor's Company Name \_\_\_\_\_ File Number(s) Reference \_\_\_\_\_  
 Contractor's Company Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**FINANCIAL DATA** Please submit the following:

- Business Financial Information for (C) Corporations, (S) Corporations, and LLCs:** Provide the company's latest CPA prepared fiscal year-end financial statement. If a CPA prepared financial statement is unavailable, provide the company's in-house prepared fiscal year-end financial statements along with the company's most recent tax return.
- or
- Business Financial Information for Sole Proprietorships and Partnerships:** Provide the company's latest CPA prepared fiscal year-end financial statement. If a CPA prepared financial statement is unavailable, provide the company's in-house prepared fiscal year-end business financial statement and a copy of Schedule C from the owners' most recent personal tax returns.
- and
- Personal Financial Statements** Provide a copy of each owner's personal financial statement. Include supporting bank and marketable securities statements for verification purposes.

**EXPERIENCE DATA**

List the three largest contracts completed in the last five years:

Owner or General	Kind of Work	Location (City/County, State)	Contract Price	Year Completed	Final Gross Profit

List the two largest jobs you presently have underway, giving the following information:

Owner or General	Kind of Work	Location (City/County, State)	Contract Price	% of Completion	Estimated Gross Profit	Date to be Completed

**OPERATIONS DATA**

Liability Insurance Company and Limits \_\_\_\_\_ Expiration Date \_\_\_\_/\_\_\_\_/\_\_\_\_

- Type of trades you perform: \_\_\_\_\_
- Territory in which you perform work (present and planned) \_\_\_\_\_
- Trades subcontracted: \_\_\_\_\_

**GENERAL DATA**

**Disputes, Financial Difficulties, Problems, Etc.**

	Company		Any officer, owner or partner	
a. Failed in business or declared bankruptcy? .....	Yes	No	Yes	No
b. Failed to complete a job or been assessed with delay damages?...	Yes	No	Yes	No
c. Been in claim with a Surety or denied bonding? .....	Yes	No	Yes	No
d. Been involved in any lawsuits or disputes in the last 5 years? .....	Yes	No	Yes	No
e. Do you have any corporate or personal assets held in trust or escrow accounts? .....	Yes	No	Yes	No
f. Are any business or personal assets restricted or pledged for any purpose (i.e. collateral for a loan, etc.)? .....	Yes	No	Yes	No
g. Were you bonded in the past - By whom? .....	Yes	No	Yes	No

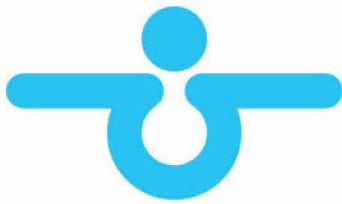
Explain all "yes" answers fully below or attach explanation

\_\_\_\_\_  
 \_\_\_\_\_

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Company Name \_\_\_\_\_ Account Number (required) \_\_\_\_\_

<b>Job Cost Breakdown</b>				
Type of Trade or Service	Amount or percent allotted	Supplier or Subcontractor	Bonded	
			Yes	No
<b>Gross Profit and Overhead</b>				
<b>Total</b> (should be 100%)				

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## Personal Financial Information

Name: \_\_\_\_\_ Soc. Sec. #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Spouse: \_\_\_\_\_ Telephone #: \_\_\_\_\_

% Owned: \_\_\_\_\_ Years Owned Business: \_\_\_\_\_ Related Experience: \_\_\_\_\_

Cash on hand and in banks		Accounts Payable	
Savings Accounts		Notes Payable to Banks and Others	
IRA or Retirement Acct.		Installment Account (Auto)	
Accounts & Notes Receivable		Installment Account (Other	
Life Insurance – Cash Surrender Value Only		Loan on Life Insurance	
Stocks and Bonds		Unpaid Taxes	
Real Estate (complete section below)		Mortgages On Real Estate	
Automobile – Present Value		Other Liabilities	
Other Personal Property		<b>Total Liabilities</b>	
Other Assets		<i>Net Worth (Assets less Liabilities)</i>	
<b>Total Assets</b>		<b>Total Net Worth &amp; Liabilities</b>	

### Real Estate Owned (Used attachment if necessary to list all properties owned.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Mortgage Holder			
Mortgage Balance			
Payment Per M/Y			

I authorize Platinum Insurance and Bonds, Inc. / and the Surety and/or Surety broker of their choice to make inquiries as necessary concerning or pertaining to the Owner(s), applicant(s), and third party indemnitor(s) listed in this application financial standing, credit report, character or manner of meeting obligations to verify the accuracy of the statements made and to determine their credit worthiness. Visit our website for FCRA disclosure. [www.platinumbonds.com/index.php/fcra](http://www.platinumbonds.com/index.php/fcra)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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