

**Subcontractor / Supplier Reference Data**

Legal Name of Bidder: \_\_\_\_\_

Physical Address of Company: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Principal Name: \_\_\_\_\_ FED ID # or SS#: \_\_\_\_\_

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

How long have you been in business? \_\_\_\_\_

What form of company? ( ) Corporation ( ) Proprietorship ( ) Partnership ( ) Sub S Corp ( ) LLC

What is your current Experience Modifier Rate (EMR)? \_\_\_\_\_

What is the average size job you have done? \_\_\_\_\_

What is the largest single job that you have done? \_\_\_\_\_

Name: \_\_\_\_\_ \$: \_\_\_\_\_ Location: \_\_\_\_\_

When was it completed? \_\_\_\_\_

What is your approximate annual volume? \_\_\_\_\_

Approximate dollar volume you are under contract for now? \_\_\_\_\_

What type of jobs do you normally do? ( ) Retail ( ) Commercial ( ) Industrial ( ) Residential

Have you ever filed for bankruptcy or receivership proceeding? ( ) Yes ( ) No

Do you have uncollected judgments against you? ( ) Yes ( ) No

Explain, if Yes: \_\_\_\_\_

Have you had any financial setbacks in the past year? ( ) Yes ( ) No

Do you carry liability insurance? ( ) Yes ( ) No

Carrier: \_\_\_\_\_ Agent: \_\_\_\_\_

**Please attach a copy of your current financial statement (Balance Sheet)**

Was your financial statement prepared by a Certified Public Accountant? ( ) Yes ( ) No

Have you provided a Payment & Performance Bond before? ( ) Yes ( ) No

What was the largest project that you have done: Unbonded? \_\_\_\_\_

Bonded? \_\_\_\_\_

Can you provide a Payment & Performance bond for this project? ( ) Yes ( ) No

Have any lawsuits been filed by or against you in the last three years? ( ) Yes ( ) No

Explain, if Yes: \_\_\_\_\_

**Suppliers:**

1. Name: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Account #: \_\_\_\_\_

Date of Account Opening:	_____
Payment Terms:	_____
Pay Per Terms:	_____
Twelve Month High:	_____
Current Balance:	_____

2. Name: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Account #: \_\_\_\_\_

Date of Account Opening:	_____
Payment Terms:	_____
Pay Per Terms:	_____
Twelve Month High:	_____
Current Balance :	_____

**Insurance: (Please Return a Current Copy of Your Insurance Certificate With These Forms)**

Name: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_

**Safety:**  
Do you have a written safety program:                     Yes      No

Who is the Safety contact person? \_\_\_\_\_

**Bonding (Performance & Payment Bond):**

Bonding Co. Name: \_\_\_\_\_  
Agent Name: \_\_\_\_\_  
Underwriting Company Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_

Bond Rate:	_____
Date of Last P & P Bond:	_____

**Bank:**

Name: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Account #: \_\_\_\_\_

Date of Account Opening:	_____
Current Balance:	_____

**Please List Below Six (6) SIMILAR Projects Completed By Your Firm within the last 2 years:**

- **Projects should be of similar size & scope**
- **Please do not duplicate contractors**

1. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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2. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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3. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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4. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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5. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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6. Name of Project: \_\_\_\_\_ Date of Completion: \_\_\_\_\_  
Approximate amount of your contract: \_\_\_\_\_ Bonded? \_\_\_\_\_  
General Contractor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Representative: \_\_\_\_\_ Fax: \_\_\_\_\_  
Number of jobs completed for this contractor? \_\_\_\_\_

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