

SureTec Agent Submission Checklist



Thank you for the opportunity to earn your business. All of the information on this checklist is mandatory for an initial Contract Bond submission. We strive to deliver great service at every stage of the bonding process, and your thoroughness at this stage ensures faster processing. Here's what we need:

Information Needed:

<input type="checkbox"/>	Last fiscal year-end financial statements on the company. If the fiscal statement is six months old or older, please provide the most current interim statement available. For bonds exceeding \$250,000, please furnish financial statements from last three years.
<input type="checkbox"/>	Complete copy of last Company Tax Return. Provide an individual return if the company is a Sole Proprietorship or Subchapter S. For bonds exceeding \$250,000, please furnish tax returns from last 3 years.
<input type="checkbox"/>	Financial statement on owners (stockholders). If possible, these should be concurrent with the company fiscal statement.
<input type="checkbox"/>	Certificate of insurance
<input type="checkbox"/>	Resume information on key people

Forms Needed:

Please answer each question on the following documents from the SureTec web site:

<input type="checkbox"/>	Contractor Bonding Questionnaire Form
<input type="checkbox"/>	Bank Reference Form
<input type="checkbox"/>	Status of contracts
<input type="checkbox"/>	Personal Financial Statement Form
<input type="checkbox"/>	Bid Bond Request Form or Payment & Payment Bond Request Form

Thank you again for the opportunity; we will respond promptly. If you have any questions, please call your SureTec underwriter. For the office near you, visit SureTec.com or call (888) 344-3362.