

Sioux Munyon

Insurance Services

CONTRACTOR'S UNDERWRITING INFORMATION CHECKLIST

1. Contractor's Questionnaire, enclosed.
2. Financial Statements:
 - a. Business (most recent year-end and preceeding two year-ends. along with a current in-house)*; and,
 - b. Personal of all owners, form enclosed if needed.

***NOTE:** Business financials should include concurrent agings of accounts receivable and accounts payable.
Business year end statements should be CPA prepared on the basis of percentage-of-completion accounting.
3. Status of Contracts Schedule, form enclosed if needed.
4. Certificate of Insurance.
5. Bank Reference Letter, form enclosed. (Please sign or "authorize" the upper right-hand corner of the letter and forward to your bank for completion and return to our office).
6. Resumes of owners and key employees.
7. Company Brochure, if available.
8. Business Plan, sample enclosed.
9. Continuity Plan (i.e. Buy-Sell Agreement, Life insurance, Wills of owners, Family Trust Agreement of owners, etc.).
10. Any other marketing information you have about your company's abilities and successes is always helpful!