

# WENDT BONDING

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## Update Questionnaire

### 1. Introduction

Contractor's Name \_\_\_\_\_ Federal Tax ID# \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax # \_\_\_\_\_ E-Mail \_\_\_\_\_

Type of Organization:    \_\_\_ Corporation    \_\_\_ Partnership    \_\_\_ Sole Proprietorship    \_\_\_ LLC

\_\_\_ Other (Specify) \_\_\_\_\_

If Corporation, have Stockholders Elected to be Considered a "Sub Chapter 'S' Corporation?    \_\_\_ Yes    \_\_\_ No

Date Business Founded \_\_\_\_\_ Date Incorporated? \_\_\_\_\_

List All Stockholders/Owners and Key Personnel in Your Business

Name & Address	Spouses Name	Title/ Position	% of Ownership	Date of Birth	Yrs. & Exp. In Const.

Are All Stockholders/Owners Actively Involved in the Business?    \_\_\_ Yes    \_\_\_ No    If No, Please Explain \_\_\_\_\_

List Affiliated, Subsidiary or Related Companies in Which This Firm or Its Stockholders/Owners Have Interest

Name & Address	% of Ownership	Scope of Operations

### 2. Financial Data

Who is Responsible for Bookkeeping? \_\_\_\_\_ Prepared    \_\_\_ Manually    \_\_\_ Computer

How Long With Firm? \_\_\_\_\_ How Many Years of Experience? \_\_\_\_\_

Who is Responsible for Estimating? \_\_\_\_\_ Prepared    \_\_\_ Manually    \_\_\_ Computer

How Long With Firm? \_\_\_\_\_ How Many Years of Experience? \_\_\_\_\_

Is a Buy-Sell Agreement in Effect?    \_\_\_ Yes    \_\_\_ No    If Yes, Please Attach a Copy

In the Event of an Owners Death, Is a Plan in Effect to Complete All Uncompleted Work?    \_\_\_ Yes    \_\_\_ No    If Yes, Please Describe \_\_\_\_\_

List Suppliers From Whom You Buy Most of Your Materials:

Name/ Contact Person	Complete Mailing Address	Telephone
1.		

2.		
3.		

Principal Subcontractors You Have Used in the Past 3 Years

Company /Mailing Address	Phone Contact Person	Type of Work Contract Amount \$	Date Completed
1.			
2.			
3.			

**3. Scope of Operation**

Largest Contracts Completed Within Last 3 Years

Owner or General Contractor Mailing Address	Phone Contact Person	Contract Amount \$	Date Completed
1.			
2.			
3.			

What is Your Expected Annual Volume for the Coming Year? \_\_\_\_\_ Expected Net Profit? \_\_\_\_\_

Largest Previous Job \$ \_\_\_\_\_ Largest Previous Cost to Complete: #jobs \_\_\_\_\_ \$ \_\_\_\_\_ Year \_\_\_\_\_

How Many Contracts do You Normally Have Underway At Any One Time #jobs \_\_\_\_\_ \$ \_\_\_\_\_

What Is The Largest Single Contract Your Company Can Best Handle \$ \_\_\_\_\_

What Is the maximum Cost to Complete That Your Company Can Best Handle #jobs \_\_\_\_\_ \$ \_\_\_\_\_

The Following Questions Pertain To the Latest Uncompleted Work On Hand. Explain Any "Yes" Answers.

- Are Any More Than 10% Low  Yes  No \_\_\_\_\_
- Are Any Projects Behind Schedule  Yes  No \_\_\_\_\_
- Are There Any Delays or Disputes  Yes  No \_\_\_\_\_
- Any In Penalty  Yes  No \_\_\_\_\_

How Much of Your Equipment is: Owned \_\_\_\_\_% Leased \_\_\_\_\_%?

Are Any Mechanics Liens, Judgments, Law Suits or Claims Pending on Completed or Uncompleted Work?  Yes  No

If Yes Give Details \_\_\_\_\_

Wendt Bonding is authorized to verify any information contained herein including but not limited to my credit and employment history and to request, obtain and use credit information on me/us in the processing of my/our application. This document, or any photostatic copy hereof, hereby authorizes any third party to furnish to Wendt Bonding with complete consumer credit reports.

**THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS**

Date: \_\_\_\_\_ Firm Name: \_\_\_\_\_

**SIGN HERE X** \_\_\_\_\_