



**HENSEL PHELPS**  
Plan. Build. Manage.



## HP BOND PROGRAM APPLICATION

### For This Program:

- Complete & Submit this Application
- Attach Corresponding Information based on page 3
- Attach Copy of your Bid Specifications or Contract

<b>CONTRACTOR INFORMATION</b>	Business (Legal) Name																			
Business Address					City			State		Zip										
Phone		Fax			E-Mail Address															
Years in Business				If Incorporated, Incorporation Date				State of Incorporation												
Subsidiaries or Affiliates																				
<b>PERSONAL INFORMATION</b>	Indemnitor Name				Social Security No.			Date of Birth		Home Phone										
Indemnitor Address/City/State/Zip								% Ownership		Indemnitor's Title										
Spouse's Name (check here if not married)					Social Security No.			% Ownership		Date of Birth										
<b>PERSONAL INFORMATION</b>	Indemnitor Name				Social Security No.			Date of Birth		Home Phone										
Indemnitor Address/City/State/Zip								% Ownership		Indemnitor's Title										
Spouse's Name (check here if not married)					Social Security No.			% Ownership		Date of Birth										
<b>JOB/PROJECT INFORMATION</b>	Bond Type (Bid, Final)		Bid/Contract Amount		Bid Date		Project Start Date		Completion Date		Bid Bond %									
Maintenance Period		Liquidated Damages		Time Allowed for Completion		Performance Bond Amount			Payment Bond Amount											
Project Description (attach copy of bid invitation/specifications or contract)																				
Project Location																				
Obligee/Owner				Contact Person				If Private Owner, Financing by												
Obligee Address/City/State Zip								Phone												
If this is a final bond request, list the top Three bidders and their amounts <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">1. _____</td> <td style="width: 30%;">_____</td> <td style="width: 30%;">_____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> <td>_____</td> </tr> </table>												1. _____	_____	_____	2. _____	_____	_____	3. _____	_____	_____
1. _____	_____	_____																		
2. _____	_____	_____																		
3. _____	_____	_____																		
<b>LARGEST CONTRACTS INFORMATION</b>				List largest contracts completed:																
Largest Project 1 (Owner/General Contractor)						Location														
Type of Work					Contract Amount		Year Completed		Final Profit											
Contact Person					Phone			Fax and/or Email												
Largest Project 2 (Owner/General Contractor)						Location														
Type of Work					Contract Amount		Year Completed		Final Profit											
Contact Person					Phone			Fax and/or Email												

<b>CURRENT JOB/PROJECT INFORMATION</b>			List the two (2) largest contracts currently underway:			
Owner/General Contractor		Type of Work		Project Location		Contract Amount
Contact Person		Phone	Fax and/or Email		% Complete	Anticipated Completion Date
Owner/General Contractor		Type of Work		Project Location		Contract Amount
Contact Person		Phone	Fax and/or Email		% Complete	Anticipated Completion Date
<b>SUPPLIER/SUBCONTRACTOR INFORMATION</b>			List the major suppliers and subcontractors with whom you have conducted business in the last 12 months:			
Name of Account Payable	Amount Owed	% Over 60 Days	Contact Person		Phone	Fax or Email
Name of Account Payable	Amount Owed	% Over 60 Days	Contact Person		Phone	Fax or Email
Name of Account Payable	Amount Owed	% Over 60 Days	Contact Person		Phone	Fax or Email
<b>OPERATIONS INFORMATION</b>						
Type of Work Performed & Territory where presently work & plan to perform work						
Trades Performed in House			Trades Subcontracted			
Largest Work on Hand in the Past	Year	Number of Jobs	Average Job Size		Average Total Work on Hand	
Bank Line Yes      No		Total Amount			Amount Available Currently	
Name of Liability Insurance Company		Expiration Date			Limits	
Agent's Name		Agent's Phone			Agents Email	
<b>DISPUTES, FINANCIAL DIFFICULTIES, PROBLEMS, ETC.</b>			Company		Any Officer, owner, partner	
1. Any company or personal assets held in trust or escrow accounts?			Yes	No	Yes	No
2. Are any business or personal assets restricted or pledged for any purpose (i.e. collateral for a loan, etc.)?			Yes	No	Yes	No
3. Bonded or declined bonding in last 3 years?			Yes	No	Yes	No
4. Has this specific request been submitted to or declined by another surety?			Yes	No	Yes	No
5. Been in claim previously with a surety?			Yes	No	Yes	No
6. Involved in any lawsuits or disputes in past 5 years?			Yes	No	Yes	No
7. Failed to complete any job or assessed delay damages or penalties?			Yes	No	Yes	No
8. Declared personal or business bankruptcy or failed in any business?			Yes	No	Yes	No
9. Delinquent in payment of any taxes?			Yes	No	Yes	No
10. Involved in any other business entities?			Yes	No	Yes	No
For any <b>YES</b> answer, provide complete detailed or copies of correspondence explaining all:						
<p align="center"><b>The following statement must be signed by an owner or officer of the company for which bonding is being requested.</b></p> <p>I acknowledge that all information is complete and correct and is given to induce the insurance company to execute surety bonds. I understand that false information may constitute misrepresentation or fraud. I authorize you to investigate the credit, character, capacity and capital of the company and its employees and owners for bonding purposes.</p> <p>Date _____ Signature &amp; Title _____</p>						
<b>PRODUCER INFORMATION</b>	Agency Name The Barbour Group, LLC		Code	Phone 410-876-9610	Email karen@thebarbargroup.com	
Agency Address 909 Baltimore Blvd, Westminster, MD 21157					Contact Person Karen Barbour	

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false, incomplete, or misleading information, or conceals information concerning any material fact thereto, commits a fraudulent insurance act, which is a crime punishable by incarceration, and shall also be subject to civil penalties.

## HENSEL PHELPS RECOMMENDATION

Years' Experience with Subcontractor: \_\_\_\_\_ HP Prequalification Done: Yes No  
Program Recommendation:

Completed  
By: \_\_\_\_\_, HP Project Manager Best Contact Number: \_\_\_\_\_

## HENSEL PHELPS ASSISTANCE PROGRAM ACKNOWLEDGEMENT

Subcontractor agrees that Program Team may be required to share confidential information pertaining to Subcontractors under the Program on an as-needed basis, and vice versa, as appropriate. By entering into this program, the Subcontractor agrees to allow for the release and exchange of such information among the Program Team notwithstanding the parties' obligations not to disclose confidential information under this program, the Privacy Act, or any other laws which could restrict or prohibit the Program Team from sharing confidential information pertaining to a subcontractor under the Program.

Signature of Authorized Party for Subcontractor:

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

Name: \_\_\_\_\_

### Tier One - Contract Amount \$400,000 or less

- Completed Application
- Copy of contract and bid results
- Latest available corporate tax return
- Acceptable credit scores
- Potential use of funds control and/or SBA Program, to be determined by underwriter

### Tier Two - Contract Amount is over \$400,000 and up to \$1,000,000

- Completed Application
- Copy of contract and bid results
- Latest available corporate tax return
- Acceptable credit scores
- Last three years corporate financial statements. Solid in-house presentation is acceptable. Externally prepared CPA statements are preferred.
- Personal financial statements - Liquid personal assets can be included in the underwriting
- Potential use of funds control and/or SBA Program, to be determined by underwriter

### Tier Three - Contract Amount is over \$1,000,000 and up to \$2,000,000

- Completed Application
- Copy of contract and bid results
- Latest available corporate tax return
- Acceptable credit scores
- Last three years corporate financial statements. Externally prepared CPA statements are preferred.
- Personal financial statements
- Potential use of funds control and/or SBA Program, to be determined by underwriter