# NEW ACCOUNT
# UNDERWRITING REQUIREMENTS

The following underwriting information is requested to open an underwriting file and determine a bond program. Forms may be found online. We are happy to review any forms you already completed for your prior agent or bank as a substitute.

Please remember that keeping your file up to date with accurate and timely information allows for faster processing of bond requests.

- Contractor's Questionnaire
- Business Financial Statements for the past two years
  (Level of reporting required varies depending on bond program; if a CPA year end statement is not required, please send Profit & Loss and Balance Sheet along with the Tax Returns for two years)
- Schedule of Aged Accounts Receivable (with retainage and subsequent collections indicated)
- Schedule of Aged Accounts Payable
- Current Work on Hand Schedule
- Personal Financial Statement
  (Statement should be completed by all owners who own 10% or more of the company. The Surety also requests that the statement be dated concurrent with the company's year end financials.)
- Certificate of Insurance
- Bank Reference
- Resume (of all management personnel)

If you should have questions about what is required or need assistance, please do not hesitate to contact our office at 617-773-9200.

*** Please visit our web site at http://www.tonry.com to obtain any required forms ***