



Detailed contractor supplemental for carrier marketing. Pair with ACORD 125, loss runs, and signed contract samples when available.

Complete digitally when possible. For online intake, mirror these sections into your client-facing smart form and require uploads for loss runs, schedules, and sample contracts where applicable.

Applicant and Ownership

Legal business name	
Entity type	v
DBA	
FEIN / Tax ID	
Website	
Business address	
Mailing address if different	
Primary contact / title	
Phone	
Email	
Years in business	
States of operation	v
Any prior name changes or acquisitions	
If yes, explain	

Operations and Revenue

Detailed description of operations	
Trade breakdown by percentage	
Largest 3 projects completed in last 12 months	
Average job size	



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Operations and Revenue (cont.)

Largest job size	
Residential / commercial split	
If mixed, provide percentage split	
New construction / remodel / service	
Any design-build or engineering responsibility	
Any EIFS, stucco, waterproofing, or envelope work	
Any work involving structural members	
Any condo / apartment / tract home work	

Hazard Exposures

Any work above 2 stories or 35 feet	
Any roofing, torch-down, hot tar, or membrane work	
Any excavation, trenching, or underpinning	
Any demolition, blasting, or shoring	
Any work on occupied buildings	
Any work in schools, hospitals, airports, or government facilities	
Any work on public roads / highways	
Any crane or heavy equipment exposure	
Any welding, cutting, or open flame operations	
Any work with mold, asbestos, lead, or silica controls needed	
Any offshore / marine / bridge work	
Describe all Yes responses	



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Subcontractors, Contracts, and Insurance

Any subcontractors used	
Estimated subcontracted cost	
Written contracts used with subs	
AI / WOS / PNC required of subs	
Certificates collected and tracked	
Hold harmless / indemnity assumed in contracts	
Any leased or temporary labor	
Any independent contractors / 1099 labor	
Additional insured requested by customers	
Waiver of subrogation requested by customers	
Primary and non-contributory requested	

Loss History and Coverage Requested

Current status	
Current carrier / expiration	
Current premium	
Any claims in last 5 years	
Describe claims, reserves, corrective actions	
Requested occurrence limits	
Products / completed ops needed	
Umbrella / excess needed	
Owners and officers to exclude from payroll if WC also quoted	
Additional notes for underwriting	



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Applicant Signature

Name

Title

Signature

Date

Suggested upload checklist for smart intake version: ACORD 125, currently valued policy or declaration page, 3 to 5 years loss runs, project schedule or property schedule, sample contract, and any supplemental applications required by carrier.