SURETY & COMMERCIAL BONDS

01 / APPLICANT AND EXPOSURE PROFILE

Complete all applicable fields. Use Unknown or N/A as needed. Attach extra pages for multiple locations or schedules.

1. Applicant and contact

Legal applicant / business name

DBA / entity type

Primary contact / title

Phone / email

Mailing address / City / State / ZIP

Website / year established

Requested effective date

Annual gross revenue

Employee count / annual payroll

Describe the business, operations, customers, locations, and states / countries involved:

2. Initial exposure questions

Is this a contract performance / payment or bid bond request? Select

Is a license, permit, court, fiduciary, or other commercial bond needed? Select

Any prior bond claim, default, bankruptcy, or unpaid judgment? Select

Any bond denied, cancelled, called, or subject to an open dispute? Select

Explain Yes / Unknown answers and any unusual exposures:

Provide current values and limits where available. These questions are an intake guide, not a carrier application.

3. Details for Surety & Commercial Bonds

Bond type / purpose / required amount

Principal legal name

Obligee name / mailing address

Required bond wording / form number

Effective date / term / filing deadline

License / permit / contract number

Contract amount / project description

Bid date / completion date if applicable

Owners / ownership % / years of experience

Current surety / producer if applicable

Work on hand / largest completed project

Financial statement date / preparer

4. Controls and supporting detail

Required obligee form and exact legal names available? Select

Financial statements and ownership information available? Select

Contract, license, court order, or other obligation provided? Select

Any pending tax lien, creditor action, or overdue obligation? Select

Any existing indemnity agreement or outstanding bond exposure? Select

Any requested changes to standard bond wording or bond term? Select

Explain bond purpose, obligation, financial concerns, claims/defaults, and any deadlines. Do not include SSNs.

Availability, eligibility, and terms depend on underwriting. Additional carrier applications may be required.

5. Existing bond history

Current surety (or None)

Bond number

Effective / expiration dates

Current limit / deductible / retention

Current annual premium (if applicable)

Requested changes / target limit

6. Claims, losses, or circumstances

Any bond claim, default, or loss in the past 5 years? Select

Any open dispute, investigation, known incident, or threatened claim? Select

Any cancellation, nonrenewal, declined application, or coverage lapse? Select

For each Yes: date, event, amount paid / reserved, current status, and corrective action. Attach details if needed.

7. Supporting documents

- [ ] Required bond form
- [ ] Contract / license / court order
- [ ] Business financial statements
- [ ] Ownership / experience summary
- [ ] Work-in-progress if applicable
- [ ] Prior bond / claim details

Send completed forms and documents to info@mad-insurance.com. Do not include passwords, payment details, or SSNs.

I confirm the information is true and complete to the best of my knowledge. This questionnaire does not guarantee a bond. Surety forms, underwriting, and approval may be required.

Applicant typed name / title

Date