

Tonry Insurance Group

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SBA SUPPORTED SURETY BOND UNDERWRITING REQUIREMENTS

Below is a list of the general underwriting information needed to open an underwriting file with SBA support and determine a bond program. Forms may be found online but we would be happy to review the required information in another format.

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

- Contractor's Questionnaire
- Statement of Personal History
 - SBA Form 912
- Business Financial Statements for the past two years
 - CPA prepared year end statement, along with the Tax Returns for two years
- Schedule of Aged Accounts Receivable with retainage
- Schedule of Aged Accounts Payable
- Current Work on Hand Schedule
 - SBA 994F or Tonry Form
- 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 Letter and Confirmation of Borrowing
- 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 ***