



bonds@catalystsurety.com  
(866) 630-5060

## Catalyst Quick Questionnaire

### SECTION 1 - BUSINESS INFORMATION

Business Name: \_\_\_\_\_ Tax ID: \_\_\_\_\_ Year Formed: \_\_\_\_\_  
 Business Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Type of Business:  C-Corp  S-Corp  LLC  Partnership  Sole Proprietorship  
 Contracting Specialty: \_\_\_\_\_ Territory of Operation: \_\_\_\_\_  
 Percentage of Your Work Is For: Government Owners: \_\_\_\_\_% Private Owners: \_\_\_\_\_% Other Contractors (as a sub): \_\_\_\_\_%  
 Trades Self-Performed: \_\_\_\_\_ Trades You Subcontract: \_\_\_\_\_  
 Preferred Job Size Range: \$ \_\_\_\_\_ to \$ \_\_\_\_\_ Ideal Number of Jobs Underway at One Time: \_\_\_\_\_  
 Employees (#): Office: \_\_\_\_\_ Field: \_\_\_\_\_  
 Certifications:  8(a)  HubZone  SDVOSB  Minority  Woman Owned Other: \_\_\_\_\_  
 Expected Annual Revenue This Fiscal Year: \$ \_\_\_\_\_ Expected Annual Revenue Next Year: \$ \_\_\_\_\_

### SECTION 2 – WORK HISTORY

#### Largest Job Completed to Date

Job Name: \_\_\_\_\_ Contract Price: \$ \_\_\_\_\_ Year Completed: \_\_\_\_\_ Bonded?  Yes  No  
 Owner: \_\_\_\_\_ Brief Job Description: \_\_\_\_\_  
 Owner Reference Contact Name: \_\_\_\_\_ Owner Reference Phone: \_\_\_\_\_

#### 2<sup>nd</sup> Largest Job Completed to Date

Job Name: \_\_\_\_\_ Contract Price: \$ \_\_\_\_\_ Year Completed: \_\_\_\_\_ Bonded?  Yes  No  
 Owner: \_\_\_\_\_ Brief Job Description: \_\_\_\_\_  
 Owner Reference Contact Name: \_\_\_\_\_ Owner Reference Phone: \_\_\_\_\_

### SECTION 3 – OWNERSHIP INFORMATION (List all company owners. List additional owners on separate pages if needed.)

Full Name: \_\_\_\_\_ Percent Owned: \_\_\_\_\_% Position: \_\_\_\_\_ Since: \_\_\_\_\_  
 Full Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN #: \_\_\_\_\_  
 Are You Married?  Yes  No  
 Spouse Full Name: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_ Spouse SSN #: \_\_\_\_\_  
 Full Name: \_\_\_\_\_ Percent Owned: \_\_\_\_\_% Position: \_\_\_\_\_ Since: \_\_\_\_\_  
 Full Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN #: \_\_\_\_\_  
 Are You Married?  Yes  No  
 Spouse Full Name: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_ Spouse SSN #: \_\_\_\_\_

### SECTION 4 – MISCELLANEOUS

Bank Line of Credit Amount: \$ \_\_\_\_\_ Name of Bank: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Has your firm or any of its owners ever petitioned for bankruptcy, failed in business, failed to complete a contract, or caused a surety loss?  
 Yes  No (If yes, please attach an explanation.)

Have any company owners or key individuals currently working within the company ever been convicted of a felony or been indicted for any crime involving fraud, embezzlement, or similar crimes?  
 Yes  No (If yes, please attach an explanation.)

Applicant(s) hereby authorize Catalyst Surety Partners, LLC ("Catalyst") and the surety companies in which they work with to obtain personal credit reports from a credit reporting agency of their respective choice and review personal credit for all individual owners and spouses listed on this form. I understand and agree that Catalyst and the sureties which they work with intend to use the credit reports for the purpose of evaluating our financial situation as part of the overall surety underwriting process.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_