

# CONTRACTOR'S QUALIFICATION STATEMENT FOR

The above company is a:  Corporation  LLC  Partnership  Individual  Joint Venture

Submitted By: \_\_\_\_\_ (Name/Title)  
Principal Office: \_\_\_\_\_ (Address 1)  
\_\_\_\_\_ (Address 2)  
\_\_\_\_\_ (City, State, Zip)  
\_\_\_\_\_ / \_\_\_\_\_ (Telephone/Fax)  
\_\_\_\_\_ (e-Mail)  
\_\_\_\_\_ (Website)

Type of Work:

General Contractor       Electrical Contractor       HVAC       Mold Remediation  
 Residential Contractor       Plumbing Contractor       Specialty (List below)

\_\_\_\_\_  
\_\_\_\_\_  
**[Attachment 1- License(s) and certification(s)]**

Submitted To: \_\_\_\_\_ (Name/Title)  
\_\_\_\_\_ (Company)  
\_\_\_\_\_ (Address 1)  
\_\_\_\_\_ (Address 2)  
\_\_\_\_\_ (City, State, Zip)  
\_\_\_\_\_ / \_\_\_\_\_ (Telephone/Fax)

Name of Project: \_\_\_\_\_

**1.0 ORGANIZATION**

1.1 How many years has the organization been in business as a contractor? \_\_\_\_\_

1.2 How many years has the organization been in business under its present business name? \_\_\_\_\_

1.2.1 Under what other or former names has your organization operated?  
\_\_\_\_\_

1.3 If the organization is a corporation or LLC, answer the following:

1.3.1 Date of incorporation or organization: \_\_\_\_\_

1.3.2 State of incorporation or organization: \_\_\_\_\_

1.3.3 President's (Managing partner's) name: \_\_\_\_\_

1.3.4 Vice-President's (Member's) name: \_\_\_\_\_

1.3.5 Secretary's (Member's) name: \_\_\_\_\_

1.3.6 Treasurer's Name (Member's) name: \_\_\_\_\_

1.4 If your organization is a partnership, answer the following:

1.4.1 Date of organization: \_\_\_\_\_

1.4.2 Type of partnership: \_\_\_\_\_

1.4.3 Name of general partner: \_\_\_\_\_  
\_\_\_\_\_

1.5 If the organization is individually owned (sole proprietorship), answer the following:

1.5.1 Date of organization: \_\_\_\_\_

1.5.2 Name of owner: \_\_\_\_\_

1.6 If the form of the organization is other than one of those listed above, describe it below and list the principals and their titles.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**[Attachment 2- Articles and/or organizing document(s) and business license(s)]**

**2.0 LICENSING**

2.1 List the jurisdictions and trade classifications in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable.

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2.2 List jurisdiction(s) in which your organization’s partnership or trade name is filed:

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**3.0 EXPERIENCE**

3.1 List the categories of work that your organization normally performs with its own workforce.

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3.2	Claims and suits (If the answer to any of the questions below is yes, please attach details)	<b>YES</b>	<b>NO</b>
3.2.1	Has your organization ever failed to complete any work awarded to it?	_____	_____
3.2.2	Are there any judgments, claims, arbitration proceedings or suits pending or outstanding against your organization or officer(s)?	_____	_____
3.2.3	Has your organization filed any lawsuits or requested arbitration with regard to construction contracts within the last five (5) years?	_____	_____

3.3 Within the last five (5) years, has any officer or principal of your organization ever been an officer or principal of another organization when it failed to complete a construction contract? \_\_\_\_\_

3.4 On a separate sheet **[Attachment 3]**, list major construction projects your organization has in progress, giving the name(s) of the project(s), owner(s), architect(s), contract amount(s), percentage(s) completed, and scheduled completion date(s) (e.g., Work in Progress Report).

3.4.1 State the total worth of work in progress and under contract: \_\_\_\_\_

3.5 On a separate sheet **[Attachment 4]**, list major construction projects your organization has completed in the past five (5) years, giving the names of the projects, owners, architects, contract amounts, date of completion, and the percentages of work performed with your own workforce.

3.5.1 State the average annual amount of construction work performed during the past five (5) years:

Year _____	Year _____	Year _____	Year _____	Year _____
(Amount)	(Amount)	(Amount)	(Amount)	(Amount)

3.6 On separate sheet **[Attachment 5]**, list the construction experience and present commitments of the key individuals of your organization (e.g., professional resumes).

4.0 REFERENCES

4.1 Trade References

Company	Account Type	Account limit

4.2 Bank Reference(s)

Bank (Name, Address, Contact Person, & Telephone Number)	Account Type (Checking, Savings, Loan, Line of Credit)

4.3 Surety and Insurance **[Attachment 6]**

4.3.1 Bonding limit \_\_\_\_\_

4.3.2 Name and address of your surety bonding company

4.3.3 Name and address of your surety bond producer (agent)

4.3.4 Does your company carry general liability insurance?      \_\_\_ Yes      \_\_\_ No

4.3.5 Amount of general liability insurance \_\_\_\_\_

4.3.6 Does your company have worker’s compensation insurance?      \_\_\_ Yes      \_\_\_ No

4.3.7 Name and address of your insurance agent(s)

General Liability Insurance	Worker’s Compensation Insurance

**5.0 FINANCING**

5.1 Financial statements for the organization (Balance sheet, income statement, and statement of cash flows) are:  
\_\_\_\_\_ Audited      \_\_\_\_\_ Reviewed      \_\_\_\_\_ Complied      \_\_\_\_\_ Prepared In-House  
\_\_\_\_\_ Prepared by a CPA      \_\_\_\_\_ Prepared by an accountant      \_\_\_\_\_ Prepared by a bookkeeper

5.1.1 Attach financial statements [**Attachment 7**]

5.1.2 Name and address of the firm preparing attached financial statements, and date the statements were prepared:

\_\_\_\_\_ (Accountant's Name/Designation)  
\_\_\_\_\_ (Firm)  
\_\_\_\_\_ (Address 1)  
\_\_\_\_\_ (Address 2)  
\_\_\_\_\_ (City/State/Zip)

5.1.3 Is the attached financial statement for the identical organization named on page one?      \_\_\_\_\_ Yes      \_\_\_\_\_ No

5.1.4 If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsiary)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5.2 Will the organization whose financial statement is attached act as guarantor of any contracts for construction?

\_\_\_\_\_ Yes      \_\_\_\_\_ No

**6.0 ATTACHMENTS**

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The undersigned certifies that the information provided herein is true and sufficiently complete so as not to be misleading and that the information is an accurate representation of (company) \_\_\_\_\_  
as of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name and Title

# Attachment 1

## Contractor's License(s) & Certification(s)

- Included
- Not Included

# Attachment 2

Articles and/or Organizing Document(s)  
and Business License(s)

- Included
- Not Included

# Attachment 3

## Major Construction Projects in Progress

- Included
- Not Included

# Attachment 4

## Major Construction Projects Completed in the Past Five (5) Years

- Included
- Not Included

# Attachment 5

## Construction Experience and Present Commitments of Key Personnel

- Included
- Not Included

# Attachment 6

## Evidence of Bonding and Insurance

- Included
- Not Included

# Attachment 7

## Financial Statements

- Included
- Not Included

# Attachment 8

## Other Supporting Documents

- Included
- Not Included