



### Contractor Information

Contact Person: \_\_\_\_\_ Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_  
Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Company Name: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Specialized Field (GC, Plumber, Electric, Roofer, etc): \_\_\_\_\_ Work Phone: \_\_\_\_\_  
\_\_\_\_\_ Email: \_\_\_\_\_

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### Insurance and Experience

Are you licensed and insured: \_\_\_\_\_ What type of insurance: \_\_\_\_\_  
How much coverage: \$ \_\_\_\_\_ License updated: \_\_\_\_\_ License # \_\_\_\_\_  
How long have you been doing business in the area: \_\_\_\_\_ How long have you been running own crew: \_\_\_\_\_  
How many guys on your crew are full time: \_\_\_\_\_

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### Current Projects and Bidding

How many projects do you have going on right now: \_\_\_\_\_ In the past year: \_\_\_\_\_  
How many jobs do you typically handle at once: \_\_\_\_\_  
What were the scopes of work: \_\_\_\_\_  
What are the addresses: \_\_\_\_\_  
Can I see the work on one or two recent jobs: \_\_\_\_\_  
How do you usually bid out your work: \_\_\_\_\_  
Are Materials and Labor charged together or separate in your bids: \_\_\_\_\_  
Do you give a written warranty for your work: \_\_\_\_\_ How long of a warranty: \_\_\_\_\_

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### Sub-contractors and more prescreening

Do you use sub-contractors: \_\_\_\_\_ Are they licensed and insured: \_\_\_\_\_  
Who is your electrician: \_\_\_\_\_ Who is your plumber: \_\_\_\_\_  
Do you belong to the Better Business Bureau or local Chamber of Commerce: \_\_\_\_\_  
Do you have any certificates/licenses regarding the skills you have: \_\_\_\_\_  
Have you ever declared bankruptcy: \_\_\_\_\_  
How often do you communicate with your clients during a job: \_\_\_\_\_  
Do you clean the job site daily: \_\_\_\_\_ Do you have a problem with signing a lien waiver: \_\_\_\_\_

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### References

Can you provide me with a list of references, with the names and numbers of customers you have done work for in the past:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_