



FIRST STEP

CONTRACT BONDS UP TO \$500,000

RLI's First Step program is designed for straight-forward construction projects with completion dates of a year or less. Credit and reference checks may be required. Valued contractor customers with solid credit and a good reputation will be considered for bonded aggregates up to \$500,000.

Prequalification Letter submissions should include:

- 1.) Completed First Step Application
- 2.) Any specific job information, if Owner and/or Job Specific

Bid Bond submissions should include:

- 1.) Completed First Step Application
- 2.) Copy of the bid invitations/specifications
- 3.) Any required bond forms

Performance & Payment Bond or Supply Bond submissions should include:

- 1.) Completed First Step Application
- 2.) Copies of the bid results
- 3.) Contract agreement
- 4.) Any required bond forms

Upon bond acceptance, a General Indemnity Agreement will be emailed to all required parties for electronic signature.

RLI's First Step program does not apply to subdivision/completion, service, residential, design-build, software, maintenance, multi-year or environmental contracts, with the exception of asbestos and lead based paint removal/abatement. This is subject to change and may not be all-inclusive.



First Step Application

Small Contract Bond Program

For Single or Bonded Aggregate Programs up to \$500,000

Email: contractbonds@rlicorp.com

Phone: (877) 833-8201

COMPANY INFORMATION		Already a First Step Customer? Fill out Company Name & Address and skip to page two.	
Employer I.D. Number (EIN) <input type="checkbox"/> Individual or Proprietorship <input type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Liability Partnership	Company Name		
	DBA Name (If Applicable)		
	Address 1		
	Address 2		
	City	State	Zip Code
	Phone Number	Website URL (Optional)	
	Year Company Formed	Prior Year Sales (\$)	
Type of Work Performed			
Largest Contract:	Year Completed	Size of Project (\$)	
Description of Work			
Has your company been in claim and/or denied bonding by another Surety? <input type="checkbox"/> Yes <input type="checkbox"/> No Please Explain:			
Does your company have any bids or unfinished contracts with other Sureties? <input type="checkbox"/> Yes <input type="checkbox"/> No Please Explain:			
Has your company been involved in any litigation or had any liens/judgements? <input type="checkbox"/> Yes <input type="checkbox"/> No Please Explain:			
Has your company or owners filed for bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No Please Explain:			

RLI Surety may obtain a credit report about the Applicant including its Owner(s) and Owner(s) spouses in order to confirm the information provided in this application and obtain information about Applicant's credit history. For new applicants a General Indemnity Agreement will need to be completed before surety credit is provided.

PRIMARY OWNER		<input type="checkbox"/> I hereby affirm that I have the power, authority and am duly authorized to execute this Agreement on behalf of the Company.			
First Name	Middle (Optional)	Last Name	Suffix (Optional)	Date of Birth	SSN
Title	Ownership (%)	Owner Address			
Phone Number	Email Address	Does the Owner own their current residence? <input type="checkbox"/> Yes <input type="checkbox"/> No What is the Owner's marital status? <input type="checkbox"/> Single <input type="checkbox"/> Married			
Spouse's Name			Date of Birth	SSN	
Phone Number	Email Address	Is the spouse also an Owner? <input type="checkbox"/> Yes <input type="checkbox"/> No	Title	Ownership (%)	

ADDITIONAL OWNER					
First Name	Middle (Optional)	Last Name	Suffix (Optional)	Date of Birth	SSN
Title	Ownership (%)	Owner Address			
Phone Number	Email Address	Does the Owner own their current residence? <input type="checkbox"/> Yes <input type="checkbox"/> No What is the Owner's marital status? <input type="checkbox"/> Single <input type="checkbox"/> Married			
Spouse's Name			Date of Birth	SSN	
Phone Number	Email Address	Is the spouse also an Owner? <input type="checkbox"/> Yes <input type="checkbox"/> No	Title	Ownership (%)	

For accounts needing single and bonded aggregate up to \$1,500,000 please see our [Next Step](#) contract bond program.

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false, incomplete, or misleading information, or conceals information concerning any material fact thereto, commits a fraudulent insurance act, which is a crime punishable by incarceration, and shall also be subject to civil penalties.

Tell us what you need. Please attach any prequalification requirements provided by owner/contractor, bid or contract documents.

Prequalification Letter Bid Bond Performance & Payment Supply

What type of letter do you need?

Bonding Capacity Limits Only Owner and/or Job Specific

Name of Specific Job (Optional)

What is the name of the party to whom you are submitting the bond or prequalification letter?

Name (Owner/Contractor)

Address 1

Address 2

City State Zip

Please provide project details.

Estimated Start Date Estimated Completion Date

Bid or Contract Date Bid or Contract Amount

Bid Bond Percentage (%)

Project Description

Percent Subcontracted (%) Liquidated Damages (\$/Day)

Maintenance Period (Months)

If Private Owner, Financing By (Optional)

Project Location

Bid Results (Optional)

Second Bidder Name Bid Amount (\$)

Third Bidder Name Bid Amount (\$)

PRODUCER INFORMATION

Agency Name Agency Code Phone

Agency Address Contact Person Email

Is this contractor an existing client? Length of Relationship Liability Insurance Co. & Limits (Optional) Comments/Recommendation (Optional)

Yes No

This application is not intended for use in connection with Design-Build Contracts, Subdivision or Site Improvements, Hazardous Material, Completion or Multi-Year Contracts, Residential, service, or software projects. This list is subject to change and may not be all-inclusive. The Applicants and indemnitors certify the truth of all statements in the application and authorize the Company to verify this information and to obtain additional information from any source including obtaining a credit report.