



NEXT STEP

CONTRACT BONDS FROM \$500,000 TO \$1,500,000

This program is designed for straight-forward construction projects with completion dates of a year or less. It 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 projects. This list is subject to change and may not be all-inclusive.

Submissions should include:

1. **Application** - Complete **Next Step Application**.
2. **Financial Information** - Provide:
 - Business tax return and financial statement.
 - Personal financial statement and personal tax return.
3. **Indemnity Agreement** - Must be completed and signed by all owners and spouses.
4. **Bid Requests** - Furnish a copy of the bid invitation document.
5. **Performance & Payment Bond** - Include copies of the bid results, contract documents, and any required bond forms.

Producer should advise applicant that certain credit and reference checks may be made during the underwriting process.

Please submit Next Step Application and information to your local branch office or
RLI/CBIC Surety at contractbonds@rlicorp.com.



Next Step Application

Small Contract Bond Program

For Bonded Aggregate Programs up to \$1,500,000

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 over \$1,500,000 please see our Standard 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?

Yes No

Length of Relationship

Liability Insurance Co. & Limits (Optional)

Comments/Recommendation (Optional)

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.