

To Whom It May Concern:

Congratulations! One of our clients has chosen your firm as the contractor for their construction project. To be qualified for this project, we will need some additional information:

1. Driver's License
2. Contractor's/Builder's license
3. Proof of Insurance/Bonds to include worker's compensation (as required by your state)
4. Contractor Profile
  - General Information
  - Previous Experience
  - Statement of Capabilities
  - References
    - Subcontractors
    - Materials
    - Clients

You will need to complete this process only once. Subsequently, we perform an annual update of licenses and insurance.

Thank you for your assistance in the process and for helping make this project a successful one.

Regards,

Construction Management

**Contractor Profile**

General Information	
Full Name	
Address	
Home Phone	
Business Phone	
Personal Email	
SSN or EIN	
Birthdate	
DL Number	
Entity Name and Type	
Entity Email	
Number of Employees	

Previous Project/Experience Information			
Year	Project Types	Total Units	Total Revenue
2018			
2019			
2020			

Statement of Capabilities	
# of projects forecasted – next 12 mos.	
# of dedicated field supervisors	
# of dedicated production admin	
# of in-house crews available	
# of foundation subs	
# of framing subs	
# of MEP subs	
# of drywall subs	

### Subcontractor References

Subcontractor Name	
Email	
Telephone	
Scope of Work Completed	

Subcontractor Name	
Email	
Telephone	
Scope of Work Completed	

Subcontractor Name	
Email	
Telephone	
Scope of Work Completed	

## Subcontractor References

Supplier Name	
Email	
Telephone	
Scope of Work Completed	

Supplier Name	Enter name
Email	Enter email
Telephone	Enter telephone
Scope of Work Completed	

Supplier Name	
Email	
Telephone	
Scope of Work Completed	

## Client References

Client Name	
Email	
Telephone	
Scope of Work Completed	

Client Name	
Email	
Telephone	
Scope of Work Completed	

Client Name	
Email	
Telephone	
Scope of Work Completed	

**Release Authorization**

The undersigned hereby declares that the statements made to Lender herein are true and correct and authorizes lender to obtain personal and/or business credit information should Lender deem it necessary.

The undersigned has been advised and further authorizes lender to obtain information concerning the undersigned’s past employment, past performance, construction contracts, work history, credit and any other matter which Lender deems relevant and authorizes but does not require Lender to disclose any such information to Lender’s borrower and/or necessary persons. During this review, the Lender reserves the right to perform a background and OFAC check. The undersigned hereby agrees that so long as Lender acts in good faith, Lender and Lender’s agent shall be held harmless and shall be indemnified in connection with any claims, suits, actions, or the like which relate in any way to said investigation or disclosures.

**Verification of Previous Work**

Should Lender be unable to verify previous scope and production capabilities with the information provided, further documentation, including bank statements and/or tax returns, may be required.

**Non-Disclosure**

Lender shall hold and maintain the Confidential Information in strictest confidence for the sole and exclusive benefit of the undersigned. Lender shall carefully restrict access to Confidential Information to employees, contractors, and third parties as is reasonably required and shall require those persons to sign nondisclosure restrictions at least as protective as those in this Agreement. The undersigned shall not, without prior written approval of Lender, use for the undersigned’s own benefit, publish, copy, or otherwise disclose to others, or permit the use by others for their benefit or to the detriment of the undersigned, any Confidential Information.

Signature:

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Print Name:	
Title:	
Date:	