



**JBL TRINITY GROUP, LTD.**  
*Insurance and Surety Services*

SURETY FORMS

## **SURETY PROGRAM CHECKLIST**

Address **50 First Ave. Atlantic Highlands, N.J. 07716**

Phone **(732) 888-5000** Fax **(732) 888-4646**

### **Checklist of items needed to apply for a surety program:**

Completed Surety Questionnaire

Corporate CPA year-end financial statements (past three years) with accountant's opinion page / related schedules.

Six-month Interim Statement

Current Corporate Tax Returns

Current Personal Tax Returns from all owners

Current Work-on-Hand Schedule

Personal Financial Statements from all owners

Resume on all owners/key employees

Bank Reference Letter

Insurance Certificate

\*Additional information may be requested.