

Qualification checklist

Credit rating information

- ④ Your most recent fiscal year-end statement (CPA prepared or internal). This MUST include the following **corresponding** items on an accrual basis:
 - ⌘ Balance sheet.
 - ⌘ Income statement (also known as profit and loss statement).
 - ⌘ Work in progress statement (if applicable).

Safety rating information

- ④ **Two** consecutive experience modification rates. This can be an NCCI worksheet or a letter from your insurance broker.
 - ⌘ Current year.
 - ⌘ Previous year.
- ④ **Three** years of OSHA 300A summary logs.
 - ⌘ 2022.
 - ⌘ 2021.
 - ⌘ 2020.

Project experience

- ④ No documentation required.
- ④ Project details: project name, description of scope, completion month/year, client reference (name/email/phone).

Banking relationship

- ④ Letter confirming line of credit amount (must be dated within 30 days of date of financials).

Insurance program

- ④ Insurance certification from your insurance broker.

Surety program

- ④ Confirmation of bonding capabilities that include following items:
 - ⌘ Surety company.
 - ⌘ Single and aggregate limits.

Safety program

- ④ Health and safety manual.