

Subcontractor Prequalification Form

Template provided by CoverWarden (coverwarden.com) — free to use and adapt. Collect this packet before contract award and refresh it annually.

1. Company information

Legal entity name (exactly as it appears on the W-9):

DBA / trade name (if any):

Business address:

Primary contact — name, title, email, phone:

Years in business:

Entity type (LLC, S-corp, etc.):

2. Licensing

Trade license #1 — type / class, number, issuing state, expiration:

Trade license #2 — type / class, number, issuing state, expiration:

Copies of all licenses attached

3. Insurance (attach ACORD 25 with endorsement pages)

General liability carrier / limits (each occurrence / aggregate):

Auto liability carrier / combined single limit:

Workers' compensation carrier / employer's liability limits:

Umbrella / excess limit:

Certificate of insurance attached — including additional insured (CG 20 10 / CG 20 37), waiver of subrogation and primary & non-contributory endorsement pages

4. Safety

EMR (current year):

EMR (prior year):

EMR (2 years ago):

EMR verification letter from carrier or agent attached

TRIR (from OSHA 300A):

DART:

Hours worked last year:

OSHA Form 300A for the most recent calendar year attached

OSHA citations in the last 3 years? (describe or 'none'):

Written safety program in place? Safety director name:

5. Financial & references

Most recent reviewed or audited financial statement attached (held in confidence)

Bonding company and aggregate bonding capacity (if applicable):

Largest contract completed in the last 3 years (\$ and scope):

Trade reference 1 — company, contact, phone:

Trade reference 2 — company, contact, phone:

6. Certification

I certify that the information provided is true and complete to the best of my knowledge, and that the attached documents are current and unaltered.

Signature:

Name / title:

Date:

Tip: chasing these documents (and re-checking them at every renewal) is the expensive part. CoverWarden collects the whole packet through one no-login link per sub — W-9, licenses, OSHA 300A, EMR and the COI with endorsement review — read automatically, subs never pay. coverwarden.com