



## Contractor Profile & Reference Form

**Contractors: Please complete the information below and submit with the following documentation:**

- State/Local Licenses and bond • Final Executed Bid/Cost Estimate • Current Liability Insurance
- Executed current W-9

**All licenses, bond and insurance must be valid through the completion of project.**

**Renovation Project Information:**

Loan Number: 2023014

Date: \_\_\_\_\_

Borrower/Co-Borrower Name: TRACEY\_GREEN

Subject Property Address:

101 RILEY AVE LONDON OHIO 43140

**Contractor Information:**

Contractor Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Business Information:**

Principal Owner: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Point of Contact: \_\_\_\_\_

Work Phone Number: \_\_\_\_\_ Cell Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_ Email: \_\_\_\_\_

**Type of Organization:**

☐Corporation ☐Partnership ☐LLC ☐Joint Venture ☐Individual Years in business: \_\_\_\_\_

Other Co. Names? \_\_\_\_\_

List jurisdictions legally licensed/qualified to conduct business: \_\_\_\_\_

Tax ID Number: \_\_\_\_\_

License Number: \_\_\_\_\_

**Bank References:**

Bank: \_\_\_\_\_

Phone: \_\_\_\_\_ Name: \_\_\_\_\_

Acct \_\_\_\_\_

**Insurance Information:**

Liability Insurance Carrier: \_\_\_\_\_ Policy #: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

**Note:** Contractors must provide a current declarations page w/minimum \$1mm per incident.

**Additional Information:**

Are there any judgments, claims, arbitration proceedings or suits pending or outstanding against you or your organization or its officers? If yes, describe in an attached document and provide 3rd party documentation. ☐Yes ☐No

Have you or your organization filed any lawsuits or requested arbitration with regard to construction contracts within the past five (5) years? If yes, describe in an attached document and provide 3rd party documentation. ☐Yes ☐No

**Client References:**

Provide three (3) client references for completed services similar to the nature, size and scope of the services to be provided for the renovation project.

**Note:** Projects included in the reference must have been completed within the last twelve (12) months.

1) Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Beginning Date of Project: \_\_\_\_\_ Ending Date of Project: \_\_\_\_\_  
**Description of Nature, Size, Scope and Dollar amount of service:**

**Project completed in a timely and satisfactorily?** ☐Yes ☐ No

**If No, please explain:**

2) Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Beginning Date of Project: \_\_\_\_\_ Ending Date of Project: \_\_\_\_\_  
**Description of Nature, Size, Scope and Dollar amount of service:**

**Project completed in a timely and satisfactorily?** ☐Yes ☐ No

**If No, please explain:**

3) Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Beginning Date of Project: \_\_\_\_\_ Ending Date of Project: \_\_\_\_\_  
**Description of Nature, Size, Scope and Dollar amount of service:**

**Project completed in a timely and satisfactorily?** ☐Yes ☐ No

**If No, please explain:**

**Contractor represents and warrants that all information in the Contractor's Profile is complete and accurate. Contractor authorizes the borrower and/or lender, to contact the references listed above to verify the information represented in this Contractor Profile.**

**Signature:** \_\_\_\_\_

**Typed/Written Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_