

CONTRACTOR INSURANCE QUESTIONNAIRE  
WE SHOP THE INSURANCE MARKET FOR YOU!



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[www.CompetitiveEdgeInsurance.com](http://www.CompetitiveEdgeInsurance.com)

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FOR PROMPT RESPONSE, PLEASE FAX or E-MAIL TO: (800) 807-0-FREE / [Alex@BeyerInsurance.biz](mailto:Alex@BeyerInsurance.biz)

Alex Beyer (Cell Phone: (916) 412-5430)

For your General Liability Insurance Quote, please completely answer the following:

- 1) Business Name: \_\_\_\_\_ License #: \_\_\_\_\_ License Type: \_\_\_\_\_
- 2) Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_
- 3) Physical Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_
- 4) Ph # ( ) \_\_\_\_\_ Fax # ( ) \_\_\_\_\_ Cell # ( ) \_\_\_\_\_ E-Mail: \_\_\_\_\_
- 5) Person to Contact about Insurance: \_\_\_\_\_
- 6) How many **active Owners/Partners/Officers** do actual hands-on construction or field supervision work? \_\_\_\_\_
- 7) My years of total experience in this line of work *prior* to getting my license: \_\_\_\_\_ Years
- 8) **OPERATIONS:** Here is a **description** of the work I plan to do over the next 12 months: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 9) A) % **Commercial Work I expect to do in the next Year:** \_\_\_\_\_ %  
Breakdown: (New Construction: \_\_\_\_\_ % Service & Repair: \_\_\_\_\_ % Remodeling: \_\_\_\_\_ %)
- B) % **Residential Work I expect to do in the next Year:** \_\_\_\_\_ %  
Breakdown: (New Construction: \_\_\_\_\_ % Service & Repair: \_\_\_\_\_ % Remodeling: \_\_\_\_\_ %)

- 10) **ESTIMATE** (next 12 months) my: **FIELD PAYROLL:** \$ \_\_\_\_\_ **GROSS RECEIPTS:** \$ \_\_\_\_\_  
(\*excluding income of owners, partners, officers, salespersons only & clerical only from field payroll) # \_\_\_\_\_ **F/T Emp** \_\_\_\_\_ **P/T Emp.**

- 11) A) Approximate % of my annual work I will **SUBCONTRACT OUT** to other licensed contractors: \_\_\_\_\_ %  
B) If I plan on hiring subcontractors, they will do the following kinds of work for me: \_\_\_\_\_  
\_\_\_\_\_

- 12) **Limits of Liability** (*I have circled my choice(s)*): ( ) ♦ \$100,000/\$300,000 ( ) ♦ \$300,000/\$300,00  
( ) ♦ \$250,000/\$500,000 ( ) ♦ \$500,000/\$500,000 ( ) ♦ \$500,000/\$1,000,000  
( ) ♦ \$1,000,000/\$1,000,000 ( ) ♦ \$1,000,000/\$2,000,000

- 13) Do I plan on doing **any work** related to the **BRAND NEW CONSTRUCTION** of CONDOS, APARTMENTS, TOWNHOMES or TRACT HOME DEVELOPMENTS? \_\_\_\_\_ If yes, here is a summary of the type of work I will perform: \_\_\_\_\_

Approximate % of my annual Gross Receipts: \_\_\_\_\_ %

Is the work for BRAND NEW CONSTRUCTION absolutely necessary for your business? \_\_\_\_\_

- 14) Do I plan on doing any service/repair/remodeling work on **EXISTING** CONDOS/APTS/TOWNHOMES? \_\_\_\_\_  
Approximate % of my annual Gross Receipts: \_\_\_\_\_ %

Is the work for EXISTING Condos/Apts/Townhomes absolutely necessary for your business? \_\_\_\_\_

- 15) Do I currently have a General Liability Policy? \_\_\_\_\_ Expiration date: \_\_\_\_\_ Ins. Co.: \_\_\_\_\_

- 16) **The Date I Want to Obtain My General Liability Insurance:** \_\_\_\_\_

- 17) Have I had any General Liability Claims in the past 5 years? \_\_\_\_\_ If yes, here are some details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Specific Questions for B, C8, C12, C39, and D49 Contractors:** Please Answer

**General (B) Contractors:** Any Roofing work planned? \_\_\_\_\_ \*If Yes, please estimate this as a % of your total gross receipts: \_\_\_\_\_%

What % will be entirely done by you and your employees? \_\_\_\_\_%

What % will be done by subcontractors you hire? \_\_\_\_\_%

What % Hot Asphalt Roofing? \_\_\_\_\_%

What % Torch Down? \_\_\_\_\_%

**C8 Contractors:** \_\_\_\_\_% Slabs & Foundations \_\_\_\_\_% Footings \_\_\_\_\_% Pumping \_\_\_\_\_% Misc. Flat Work \_\_\_\_\_%

**C12 Contractors:** \_\_\_\_\_% Excavation \_\_\_\_\_% Grading \_\_\_\_\_% Paving (If any paving, any public roads? \_\_\_\_\_)  
Any work below grade? \_\_\_\_\_ (If yes, maximum depth in feet: \_\_\_\_\_)

**C39 Contractors:** \_\_\_\_\_% New Roofing \_\_\_\_\_% Re-Roofing \_\_\_\_\_% Hot Asphalt \_\_\_\_\_% Torch Down \_\_\_\_\_%

**C49 Contractors:** Will there be any use of chemical sprays/pesticides? \_\_\_\_\_ If so, what % of operations? \_\_\_\_\_%

\_\_\_\_\_  
Date                      Your Signature                      Printed Name/Title

**OTHER INSURANCE COVERAGES and SERVICES OFFERED**

(For a FREE, no obligation quote, whether or not you already have some of these coverages or have any renewals coming up, circle the numbers of the services listed below and we'll do our very best to get you better coverage for less!  
I will contact you to talk about your needs on the services below that indicate *Yes*)

- 1) Do you need **Workers' Compensation** Insurance? \_\_\_\_\_ (Authorized broker for the State Compensation Insurance Fund)  
*FEIN/SS#:* \_\_\_\_\_ - \_\_\_\_\_ (Required for quote on WC Application)
- 2) Commercial **Vehicle** Coverages: Do you have any autos or trucks that you would like insured?  
Who is your current Insurance Carrier? \_\_\_\_\_
- 3) **Equipment/Tools** Coverages: Do you have any equipment or tools you would like insured?  
Who is your current Insurance Carrier? \_\_\_\_\_
- 4) Do you need any Bid and/or Performance **Bonds**? Who is your current Bond Company? \_\_\_\_\_
- 5) Do you **own a commercial building** which will need insurance? \_\_\_\_\_
- 6) Do you need any **Builder's Risk / Course of Construction** Insurance?: \_\_\_\_\_
- 7) Are you interested in **Health Insurance (Personal or Business)**? \_\_\_\_\_
- 8) Are you interested in **Disability Insurance**? \_\_\_\_\_
- 9) Are you interested in **Life Insurance, Key Man Insurance or Buy-Sell Agreements**? \_\_\_\_\_
- 10) Are you interested in **Aflac (Accident Indemnity, Cancer/Specified Illness, Dental, Specified Health, Hospital Confinement, Hospital Intensive Care, etc.)** ? \_\_\_\_\_
- 11) Are you interested in a **reading or listening list** of books and tapes that could help your business to succeed?
- 12) Would like to talk to our corporate attorney to find out more about how to protect your business and your personal assets, and possibly save some taxes? (If you allow us to give you a free quote, this is a FREE consultation)
- 13) We are able to offer our services for lower fees because we work only with clients who are great to deal with. Do you know anyone else like yourself who might need contractors or other business insurance coverages? We'll be sure to take great care of them. Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Thank You & I Look Forward to Having You As A Valued Client!**

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