



### MBDI Agent/Broker Referral Network Questionnaire

MBDI Creates Bondable Contractors. Most MBDI contractor participants have never been bonded and do not have a surety agent/broker. MBDI's comprehensive educational curriculum coupled with strategic one-on-one consulting assists contractors to get bond ready. Once contractors are "underwriter ready," we hand them off to an Agent/Broker Referral Network member to make the transaction. MBDI has created the Agent/Broker Referral Network to assure that our contractor participants have sound representation in the marketplace. We thank you for your interest in joining the MBDI team.

1. Name of Agency/Brokerage: \_\_\_\_\_  
Address: \_\_\_\_\_  
Website \_\_\_\_\_

2. Name of Individual Agent/Broker Applying: \_\_\_\_\_  
Work Phone: \_\_\_\_\_  
Mobile Phone: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

3. All MBDI Agent/Broker Referral Network members must be licensed in their state of operation.  
Producer License Number: \_\_\_\_\_  
Insurance Agent Number: \_\_\_\_\_

4. All Bonding Referral Network Agencies/Brokerages must be licensed in their state of operation. Is your agency/company licensed to write surety bonds in your state?  
Yes/No:                      If yes License Number: \_\_\_\_\_

5. Is your agency a certified MWBE/DBE? Yes              No

6. Please list the sureties for which you hold powers:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Have you participated in other bonding readiness training sessions for MWBEs, DBE's or emerging contractors? Yes              No

8. If you answered yes to Number 7, please tell us in what training sessions you have participated and how you have helped.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Please tell us why you are interested in being a Bonding Referral Network Member.

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10. Please relate your agency's experience in the emerging contractor bonding field. Please provide us with the types of firms you have worked with in the past year, including the number of firms and their revenue size. What has your success ratio been of applications to bond lines?

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11. Are you interested in assisting with classroom instruction from time to time to help contractors prepare to apply for their first bond? Yes      No

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**IN ORDER TO PARTICIPATE IN THE BROKER/AGENT REFERRAL NETWORK, THE FOLLOWING CRITERIA MUST BE AGREED TO AND FOLLOWED:**

- 1) Hold Harmless Agreement: MBDI is not an insurance agency or brokerage firm and does not provide agency or brokerage services or place or write surety bonds or any other insurance. By applying to join the Agent/Broker Bonding Referral Network, I hereby agree to sign the Hold Harmless Agreement attached to these services. **A copy of the Hold Harmless Agreement is provided along with this application.**
  
- 2) \*\*\* I agree to report the following information to MBDI (initial) \_\_\_\_\_
  - a. Bid Bonds:
    - i. Request date
    - ii. Result of request for Bond (approved or declined)
  
    - iii. If declined, what areas do you suggest that MBDI should address to help prepare them for bonding in the future?
    - iv. Amount of approved Bond
  - b. Payment and Performance Bonds:
    - i. Request date
    - ii. Result of request for Bond (approved or declined)
    - iii. If declined, what areas do you suggest that MBDI should address to help prepare them for bonding in the future?
    - iv. Amount of approved Bond
    - v. Was this bond tied to a prior reported Bid Bond?
    - vi. Final Bond Amount, including change orders
  - c. Other Bonds (e.g. Maintenance Bonds)
    - i. Request date
    - ii. Result of request for Bond (approved or declined)
    - iii. If declined, what areas do you suggest that MBDI should address to help prepare them for bonding in the future?
    - iv. Amount of approved Bond
    - v. Was this bond tied to a prior reported Bid Bond?
  - d. Bond Programs
    - i. Date awarded
    - ii. Bonds written within the program (see above)
    - iii. If the contractor caps its bond program, is there work that you suggest that MBDI can do to help them increase their bond program limits?
    - iv. Increases and Decreases in Bond Program Limits
  - e. Infrastructure Change or Maintenance Requirements by Surety: are there areas that you suggest MBDI can work with the contractor to help to satisfy surety underwriting requirements (e.g. requirement for audited financials, or improvements in a WIP schedule or bookkeeping)?



I attest that I have answered all questions as thoroughly and accurately as possible.

Application Presented On behalf of Agent/Referral Network Applicant:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

Application Accepted on behalf of MBDI:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

For MBDI Use Only  
Status of Application:

\_\_\_\_\_ Accepted

\_\_\_\_\_ Declined