

## Contractor Profile Report

### Contractor Information

Case Number: \_\_\_\_\_ Date: \_\_\_\_\_  
Borrower Name: \_\_\_\_\_ Co Borrower Name: \_\_\_\_\_  
Contractor Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Point of Contact: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_ Alternate Number: \_\_\_\_\_

### Organization

Type of Organization: Corporation \_\_\_ Partnership \_\_\_ Limited Liability Company \_\_\_ Joint Venture \_\_\_  
Individual \_\_\_  
Other Number of years in which organization has been in business under present name: \_\_\_\_\_  
List jurisdictions legally licensed/qualified to conduct business:  
\_\_\_\_\_  
Tax ID Number: \_\_\_\_\_ License Numbers: \_\_\_\_\_

### Types of Work/Experience

List the types of work performed directly by the organization:

\_\_\_\_\_  
\_\_\_\_\_

Provide information on two projects completed by the organization within the last year including the name and location of the projects, contact information, contract amounts, and dates of completion.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_

Are there any judgments, claims, arbitration proceedings, or suits pending or outstanding against the organization or its officers? \_\_\_\_\_ If so, describe in an attached document.

Has the organization filed any lawsuits or requested arbitration with regard to construction contracts within the last five years? \_\_\_\_\_ If so, please describe in an attached document.

### Financial References

Banks/Creditors/Bonding Company

\_\_\_\_\_  
\_\_\_\_\_

Copy of most recent financial statement (audited if available) is attached.

### Insurance

Insurance Company with Type, Amount of Coverage, Contact, and Phone Number of Contact

\_\_\_\_\_  
\_\_\_\_\_

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

Signature: \_\_\_\_\_  
Contractor Name: \_\_\_\_\_  
Title: \_\_\_\_\_ Date: \_\_\_\_\_

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# Instructions

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## Contractor Profile Report

Borrowers can use this document to gather information on contractors they are considering to do their planned renovations. On this document, borrowers can list information about a contractor's organization, work experience, financial references, and insurance.

## Copies

Original.

## Print this form

This form must be printed on letter size paper, using portrait format.

## Instructions

Lenders can make copies of this form and give it to their borrowers.

This is NOT a required document for HomeStyle mortgages. Rather, it is a Model Document that lenders can use.