



**SUBCONTRACTOR &  
VENDOR STATEMENT**

**QUALIFICATIONS  
BID & PROCUREMENT LIST**

**EVEREST HAS NEVER FAILED TO COMPLETE ANY WORK AWARDED**

Everest Group, Inc., in an effort to understand your company's capabilities and to create a bid list we request that every subcontractors and supplier complete the form prior to bidding on any of our projects. The questionnaire is confidential and used to determine your firm's credentials, work experience, project capacity, and reputation for work. We trust that you will see this request not as an invasion of your business's privacy, but as an effort to make sure that we have drawn together subcontractors and vendors who will embrace professionalism. We believe successful construction projects are not created by chance but through team work/efforts championing skill, integrity and responsibility.

**This statement must be updated annually and a letter requesting this will be sent and must be completed. Like our policy of zero tolerance on horseplay at jobsites we require all forms and paperwork to be completed.**

**General:**

Legal: \_\_\_\_\_

DBA: \_\_\_\_\_

Address: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Years in Business: \_\_\_\_\_ Federal Employer ID: \_\_\_\_\_ Sales Tax No: \_\_\_\_\_

Website: \_\_\_\_\_

Principals/Owners with titles: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Organization:**

Company Type: \_\_\_\_\_

Primary Market(s) Served: \_\_\_\_\_

Geographic Work Area: \_\_\_\_\_

Location of additional offices: \_\_\_\_\_

Classification: \_\_\_\_\_ Labor Affiliation: \_\_\_\_\_

Equal Employment Opportunity Status: \_\_\_\_\_

If minority, which one: \_\_\_\_\_

Current number of employees: Office \_\_\_\_\_ Field \_\_\_\_\_ Shop \_\_\_\_\_

Principal Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_ Cell: \_\_\_\_\_

Estimating Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_ Cell: \_\_\_\_\_

Office Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_ Cell: \_\_\_\_\_

Name of Parent Company: \_\_\_\_\_

Parent Company Address: \_\_\_\_\_

\_\_\_\_\_

Subsidiaries of Company: \_\_\_\_\_

Subsidiaries Address: \_\_\_\_\_

\_\_\_\_\_

Trade Association Memberships: \_\_\_\_\_

\_\_\_\_\_

Trade Association Awards: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Training Programs/Accreditations earned or acquiring (craft and management) employee names and designations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Work:**

Division of Work Performed / Materials Supplied / CSI Code:

---

---

---

---

---

---

---

Typical Project Value: \_\_\_\_\_

Provide Project Name & Location, Contract Value, General Contractor Company Name, Contact, Phone

Largest Project completed or in progress: \_\_\_\_\_

Three Recent Projects:

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

What portion(s) of your work is subcontracted to others? \_\_\_\_\_

Total Number of Projects in Progress \_\_\_\_\_ Total Contract Value \_\_\_\_\_

Current Backlog Value \_\_\_\_\_

If you are submitting this prequalification statement to bid on a specific project, what is the name and location of the project? \_\_\_\_\_  
\_\_\_\_\_

**Financial:**

Dunn & Bradstreet Number: \_\_\_\_\_ Current D & B Rating: \_\_\_\_\_ Paydex Rating: \_\_\_\_\_

Remarks: \_\_\_\_\_  
\_\_\_\_\_

Have you ever sold your receivables? Yes \_\_\_ No \_\_\_ If yes, to whom and for what purpose?

Name of your bank: \_\_\_\_\_

Address: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Line of Credit: \_\_\_\_\_ Unused Portion: \_\_\_\_\_

Exp. date: \_\_\_\_\_

**Bonding:**

Surety Company: \_\_\_\_\_

Broker: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

Bonding capacity: \_\_\_\_\_ Bonding Rate: \_\_\_\_\_

Date, amount and type of last bond issued: \_\_\_\_\_

**Safety:**

If the answer to any of the questions below requests details, then please attach.

Please list your firm's Workers' Compensation Experience Modifier Rating (EMR) for:

Current year \_\_\_\_\_ Prior year \_\_\_\_\_ Two years ago \_\_\_\_\_

Does your company have a full time Safety Manager/Coordinator? Yes \_\_\_ No \_\_\_\_\_

Has your firm had a job site fatality in the last three (3) years? Yes \_\_\_ No \_\_\_ If yes, please explain in detail.

Has your firm had any OSHA Citations in the last three (3) years? Yes \_\_\_ No \_\_\_ If yes, please explain in detail.

Does your Company have a written SAFETY Program covering the scope of your operations?

Yes \_\_\_ No

**Insurance:**

Broker: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Years with Broker: \_\_\_\_\_

General Liability Limit: \_\_\_\_\_

Workers Compensation Limit: \_\_\_\_\_

Professional Liability Limit: \_\_\_\_\_

Umbrella Liability Limit: \_\_\_\_\_

Automobile Liability Limit: \_\_\_\_\_

**Sustainability:**

Participated on a LEED Certified Project: \_\_\_\_\_

How many LEED Certified Projects: \_\_\_\_\_

Which LEED Rating System Was Utilized: \_\_\_\_\_

Level(s) of Project Certifications Achieved: \_\_\_\_\_

Did your firm perform design? \_\_\_\_\_

Did your firm perform Material Selection? \_\_\_\_\_

Participate in a Commissioning Process: \_\_\_\_\_

Contact Responsible for Data/Documentation Collection: \_\_\_\_\_

How many LEED Accredited Professionals Employed by your firm: \_\_\_\_\_

Participated on a Project Certified by an Organization other than the USGBC/GBCI? \_\_\_\_\_

If yes, what rating system was utilized? \_\_\_\_\_

**References:**

Provide Company Name, Contact, Phone, email

List four major suppliers:

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

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

3. \_\_\_\_\_

4. \_\_\_\_\_

List four General Contractors you do business with:

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

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

3. \_\_\_\_\_

4. \_\_\_\_\_

**Legal:**

If the answer to any of the questions below is yes, then please attach details.

Has your organization ever failed to complete any work awarded to it? No \_\_\_ Yes \_\_\_

Are there any judgments, claims, liens, arbitrations/mediation proceedings, or lawsuits pending or outstanding against your company or its officers? No \_\_\_ Yes \_\_\_

Has your organization been a party to any lawsuits or requested arbitration/mediation proceedings with regard to construction contracts or construction defect claims within the last five years? No \_\_\_ Yes \_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## SUBCONTRACTOR STATEMENT

**THE FOLLOWING MUST BE PROVIDED FOR CONSIDERATION AND MUST ALSO BE PROVIDED ANNUALLY**

1. **A letter from your Surety** (*we are not asking for a bond*) outlining the single project and aggregate amounts they will issue a payment and performance bond for to your company.
2. **A current certificate of insurance on the ACORD form**
3. **A copy of your latest (consolidated) financial statement, (i.e., Balance Sheet, Income Statement, etc.), prepared by an accounting firm (Audited, Reviewed, or Complied) AND a copy of your most recent internal financial statement.**
4. **Certificate evidencing minority status (if applicable).**
5. **OSHA 300A Log.**
6. **Documentation evidencing current EMR.**
7. **Submit Bank Reference Questionnaire to your Bank for Completion.**

**Please be assured your financial information will be kept confidential and will be used solely to determine your firm's qualification for Everest Construction Group projects. Your prequalification status *cannot* be determined until this statement is accurately completed, and the above information is received.**

***SIGNATURE & NOTARIZATION:***

Dated on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Organization's Name: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

\_\_\_\_\_, being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading. Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Notary Public's Signature \_\_\_\_\_

My commission Expires: \_\_\_\_\_

(seal)

**DO MARK CONFIDENTIAL & SUBMIT ORIGINALS BY MAIL TO:**

Everest Group, Inc., Attn: Chris Robertson 5307 E. Mockingbird Ln. Ste. 523 Dallas, TX 75206  
Direct questions email: [chrisr@everestconstructiongroup.com](mailto:chrisr@everestconstructiongroup.com)

**BANK REFERENCE QUESTIONNAIRE**

FROM: \_\_\_\_\_

TO: \_\_\_\_\_ Company Bank Employee Name

Address, City, State, Zip \_\_\_\_\_

Name of Bank: \_\_\_\_\_

How long has customer been banking with you? \_\_\_\_\_

Does the above company have any loans with your bank? \_\_\_Yes\_\_\_No

If yes, are payments current and made on time? \_\_\_Yes\_\_\_No

What is the current line of credit available? \$ \_\_\_\_\_

What is the average monthly balance in their checking account: \$ \_\_\_\_\_

Name and Title Company Officer: \_\_\_\_\_

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

Name of Bank Representative and Title: \_\_\_\_\_

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

Please return this form to: **PLEASE DO MARK CONFIDENTIAL**

Everest Group, Inc.

ATTN: Chris Robertson

5307 E. Mockingbird Ln. Ste. 523

Dallas, TX 75206

Phone: 214-999-9399