

BOND REQUEST

Please designate the bond type you need or send us a copy of the form or request you received:

- Utility Deposit Bond (i.e., electric, water, or any other utilities)
- 401K, Pension or ERISA Plan Bonds
 - Describe Products/Services of Business: _____
 - Total Assets In the Plan: _____
 - Does the fiduciary invest any of the trust funds in the employer's business? _____
(If the administrator of the plan invests funds back into your business)
 - Percentage Of Assets Invested In Non-Qualified Investments: _____
(Non-qualified assets: if more than 5% of the plan assets are in limited partnerships, artwork, collectibles, mortgages, real estate or securities or "closely-held" companies and are held outside of regulated institutions such as a bank; an insurance company; a registered broker-dealer or other organization)
- Agricultural Dealer Bonds (Products Dealer License Form needed)
- Fiduciary / Fidelity Bonds (Contact us for application)
- Notary or Licensing Bonds
 - Please provide License number: _____
- Other please describe _____

Effective Date needed: _____ Limit needed: _____

Name on account: _____

Mailing Address: _____

Obligee/Electric Company: _____ Account Number: _____

Service Address: _____

Owner Name: _____ Social Security Number: _____

Home Address: _____

Note: In order to receive a lower bond rate, personal and business financials may be needed.

Please fax or email this completed form to our office and one of our team members will contact you for any additional information or questions we may have.

Thank you for contacting our office!



16506 Pointe Village Drive, Suite 103 Lutz, FL 33558

Phone 813-926-1721 FAX 813-926-1724

www.BesnardInsurance.com or Email us at Bonds@BesnardInsurance.Com