



FORM CIS

Contractor Information Sheet

One sheet per general contractor. Required before the first construction draw is funded.

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Return completed forms through the CR Equity AI borrower portal at portal.crequity.ai, or email them to info@crequity.ai. Do not send Social Security numbers, account numbers, or other sensitive personal information by unsecured email — use the portal.

01 CONTRACTOR

COMPANY LEGAL NAME		DBA, IF ANY	EIN	
PRIMARY CONTACT	PHONE	EMAIL		
BUSINESS ADDRESS	CITY	STATE	ZIP	YEARS IN BUSINESS
WEBSITE	CREWS AVAILABLE FOR THIS JOB	JOBS CURRENTLY ACTIVE		

IS THE CONTRACTOR RELATED TO, OR AFFILIATED WITH, THE BORROWER OR ANY GUARANTOR?

No Yes — describe below

DESCRIBE THE RELATIONSHIP

02 LICENSE

LICENSE TYPE	STATE OF ISSUANCE	LICENSE NUMBER	LICENSE EXPIRATION
NAME ON LICENSE	YEARS LICENSE HELD		

ANY LICENSE SUSPENSION, REVOCATION, OR DISCIPLINARY ACTION EVER?

No Yes — explain in Part 05

03 INSURANCE

Certificates must name CR Equity AI, Inc. and its successors and assigns as additional insured and certificate holder.

COVERAGE	CARRIER	POLICY NUMBER	LIMIT	EXPIRATION
General liability				
Workers' compensation				
Builder's risk				
Commercial auto				
Umbrella / excess				

HAS CR EQUITY AI, INC. BEEN ADDED AS ADDITIONAL INSURED AND CERTIFICATE HOLDER?

Yes — COI attached Not yet



04 THIS PROJECT

PROJECT ADDRESS	TOTAL CONTRACT AMOUNT	CONTRACT DURATION (DAYS)
CONTRACT TYPE	WHO PULLS THE PERMITS?	
Fixed price Cost plus Time and materials	Contractor Borrower Not required	
SUMMARY OF THE WORK THIS CONTRACTOR IS PERFORMING		

05 REFERENCES & DISCLOSURES

REFERENCE NAME	RELATIONSHIP	PROJECT ADDRESS	PHONE	EMAIL

Has the company or any principal filed for bankruptcy in the last seven years?	Yes	No
Has a mechanic's lien been filed against any project by the company or its subcontractors in the last three years?	Yes	No
Is any litigation or arbitration pending involving the company's construction work?	Yes	No
Has the company failed to complete a project it was contracted to perform?	Yes	No

EXPLANATION

06 DOCUMENTATION REQUIRED BEFORE THE FIRST DRAW

Signed IRS Form W-9	Certificate of insurance naming CR Equity AI, Inc. as additional insured
Copy of the current contractor license	Fully executed construction contract with the borrower
Lien waiver forms the contractor will use — conditional and unconditional	Voided check or bank letter for payment routing

The undersigned certifies that the information on this sheet is true and complete, that the licenses and policies listed are current, and that the undersigned will notify CR Equity AI, Inc. within five business days of any lapse, cancellation, or material change. CR Equity AI, Inc. does not select, endorse, employ, or supervise the contractor, and the borrower remains solely responsible for the contractor's performance.

CONTRACTOR

SIGNATURE	DATE
PRINTED NAME	TITLE

BORROWER

SIGNATURE	DATE
PRINTED NAME	