CPA's Guide to **Surety Bonding**

WITH TERRY THOMPSON, DIRECTOR OF UNDERWRITING, RLI SURETY AND HAL AVERETTE, SENIOR ADVISOR, JONES ADVISORS

Join us for an interactive session designed specifically for CPAs and financial advisors seeking to deepen their expertise in surety bonding, financial evaluation, and contract underwriting. This course provides actionable insights into helping contractor clients maximize their bonding capacity while strategically balancing tax planning with stringent financial reporting requirements. By mastering these key concepts, you will enhance your role as a trusted advisory partner alongside lenders, attorneys, and surety agents. Equip your clients with the tools and financial presentation strategies required to qualify for larger public and private projects while navigating underwriting adjustments and avoiding common financial pitfalls.



Terry Thompson
Director of Underwriting,
RLI Surety



Hal Averette
Senior Advisor,
Jones Advisors

DATE

December 2, 2026

TIME

8 - 8:30AM: Registration
8:30 - 11AM: Discussion
*Light breakfast + refreshments provided

LOCATION

Raleigh Country Club
located at 400 Donald Ross Dr.
near downtown Raleigh

TOPICS

- Surety Fundamentals vs Insurance
- Types of Contract & Commercial Bonds
- Underwriting & the Prequalification Process
- Financial Analysis & Key Ratios
- Work in Progress (WIP) Diagnostics
- Navigating Tax Minimization vs. Bond Capacity
- Bond Life Cycle & Claims Handling

To RSVP: or email events@jones-insurance.com