FREE PRINTABLE CHECKLIST · LINKUN FOUNDATION

Estimates and contracts checklist

What to put in writing before you start work, so you get paid what you agreed and avoid disputes.

A clear written agreement is one of the best ways to get paid on time. This list is educational; have a lawyer review contract templates you'll use often.

Every estimate or quote

- [ ] Your business name, contact details, and license number if your trade requires one.
- [ ] The customer's name and contact details.
- [ ] What's included, described specifically, and what's not included.
- [ ] The price, with materials and labor shown separately if that's normal in your trade.
- [ ] How long the price is good for.
- [ ] Deposit required and when the balance is due.

Every agreement

- [ ] Start and finish dates or delivery dates.
- [ ] Payment schedule (deposit, milestones, final payment) and accepted payment methods.
- [ ] Late payment terms, if you use them.
- [ ] How changes are handled: a written change order with a new price before extra work starts.
- [ ] Cancellation terms and what happens to the deposit.
- [ ] Who owns the finished work (for creative and digital work).
- [ ] Signatures and dates from both sides. A signed PDF or e-signature works.

After the work

- [ ] Get written sign-off that the work is complete.
- [ ] Send the final invoice the same day. Our free invoice generator can help.
- [ ] Keep the estimate, agreement, change orders, and invoices together.

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