

Consulting Agreement Checklist

Action Checklist — ClearLegalTips.com (2026)

Set expectations for hourly or retainer consulting work before the engagement starts.

Engagement

- ☐ Described the advisory services and covered subject (Section 1)
- ☐ Stated that services are advisory and implementation is the client's job
- ☐ Chose hourly, retainer, or project fee model (pick one in Section 3)
- ☐ Set the term and time commitment (Section 2) Retainer Mechanics (if applicable)
- ☐ Defined what the monthly fee covers (hours, cadence, or access)
- ☐ Set the rollover rule: unused hours expire or roll over (capped)
- ☐ Set the overage rate for work beyond the retainer
- ☐ Scheduled a quarterly true-up to keep the retainer matched to reality Money & Taxes
- ☐ Set the rate/amount, invoice due date, and late-fee terms
- ☐ Listed reimbursable expenses and pre-approval rule (Section 4)
- ☐ Collected a W-9; noted the 2026 \$2,000 1099-NEC threshold (Section 5) Consultant Protections
- ☐ Kept the no-guarantee-of-results / client-authority clause (Section 6)
- ☐ Kept the methodology / framework ownership carve-out (Section 8)
- ☐ Kept the liability cap tied to fees paid (Section 9)
- ☐ Added confidentiality terms; paired with an NDA if needed (Section 7) Execute
- ☐ Set termination notice and wind-down obligation (Section 10)
- ☐ Filled in governing state and dispute forum (Section 12)
- ☐ Both parties signed and dated

INSTRUCTIONS FOR USE

Work top to bottom. The retainer-mechanics and consultant-protections sections are where consulting disputes hide — do not skip them. Softening any of Sections 6, 8, or 9 changes the risk you carry. This checklist is general information, not legal advice; consult a licensed attorney for regulated-industry or high-value engagements.