

Service Agreement Checklist

Action Checklist — ClearLegalTips.com (2026)

Lead every engagement with your own paper. Work top to bottom before starting a project.

Before You Send It

- ☐ Filled in the bracketed parties, address, and date
- ☐ Described the services, or attached a one-page Statement of Work
- ☐ Confirmed change-order rule for work outside the SOW

Payment Armor

- ☐ Set the deposit (30–50%) due before work begins
- ☐ Set the fee, balance trigger (delivery or milestones), and invoice due window
- ☐ Added the late fee (about 1.5%/month) with the suspension-on-nonpayment right
- ☐ Set the kill fee (25–50% of remaining SOW value) for termination without cause

Scope & Timeline

- ☐ Capped revision rounds and set the request window
- ☐ Priced extra revisions and defined “revision” vs. change order
- ☐ Set the client response window and day-for-day delay rule
- ☐ Named one authorized point of contact

Ownership & Protections

- ☐ Confirmed IP transfers only on full payment (not on delivery)
- ☐ Kept your pre-existing tools and added a portfolio-display right
- ☐ Included confidentiality, warranty, and liability-cap clauses
- ☐ Set governing state, venue, and termination notice period

Execute

- ☐ Both parties signed and dated before any work started
- ☐ Attached a fresh SOW referencing this master agreement for the project

INSTRUCTIONS FOR USE

Start on paper, not a handshake — the agreement's leverage exists only before the work does. The two clauses freelancers skip and later regret: the deposit (your underwriting on a stranger) and payment-triggered IP (your best collections tool). Never sign a client's template unread; at minimum redline payment timing, IP, and liability to match your standards. This checklist is general information, not legal advice. Laws vary by state and change over time — consult a licensed attorney for your situation.