

Settlement Agreement Checklist

Action Checklist — ClearLegalTips.com (2026)

Make the resolution final and enforceable.

Step 1 — Terms

- ☐ Named all parties and described the dispute
- ☐ Stated payment amount and schedule

Step 2 — Release

- ☐ Chose general or limited release and defined the claims
- ☐ Added no-admission-of-liability

Step 3 — Protections

- ☐ Added confidentiality / non-disparagement if wanted
- ☐ Installments: added default/acceleration; release conditional on full payment
- ☐ Employees 40+: confirmed OWBPA 21-day review + 7-day revocation

Step 4 — Execute

- ☐ Did not pay/perform until signed
- ☐ Both parties signed and kept a copy
- ☐ Considered tax treatment / 1099 for sizable amounts

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