

Your Complete Contractor Switching Checklist

How to Use This Checklist

Switching contractors doesn't have to be stressful. Whether you're dissatisfied with your current provider, looking for better pricing, or simply ready for a change, following a structured process protects your investment, keeps your project on track, and ensures a smooth handoff. Use this ten-point checklist to navigate the transition with confidence.

Ten-Point Transition Checklist

01

Review Your Current Contract Before Taking Any Action

Locate your existing service agreement and read it carefully. Pay close attention to termination clauses, notice periods (commonly 30–90 days).

02

Document All Work Completed to Date

Before the switch, create a thorough record of all work your current contractor has performed, and ask for records that substantiate prior work if it was not delivered previously. Take dated photographs, compile invoices, and note any outstanding punch-list items. This documentation protects you if questions arise later about the scope or quality of work already completed.

03

Secure All Warranties, Permits, and Certificates

Request copies of all permits pulled, inspection sign-offs, material warranties, and workmanship guarantees associated with your project. These documents belong to you as the property owner and will be essential for your new contractor to pick up where the last one left off.

04**Settle Outstanding Payments — But Only What Is Owed**

Calculate what is legitimately owed to your current contractor based on work **actually completed** and documented. Avoid making advance payments for unfinished work. If there is a financial dispute, consult a legal professional before issuing any final payment to avoid waiving future claims.

05**Issue a Formal Written Termination Notice**

Notify your current contractor of the termination in writing — via certified mail or a tracked email — referencing the specific contract clause and effective date. Keep a copy of all correspondence.

06**Obtain a Detailed Project Status Report**

Ask your outgoing contractor for a written handover summary that includes materials on-site, sub-contractors involved, outstanding orders, and the current status of each task. A professional contractor should provide this willingly; reluctance to do so is a red flag worth noting.

07**Research and Vet Replacement Contractors Thoroughly**

Don't rush the selection of your new contractor. Verify their licensing, insurance (general liability and workers' compensation), qualifications, and references. Check online reviews and ask for recent project examples like yours. A well-vetted contractor reduces the risk of repeating the same experience.

08**Get a Comprehensive New Contract in Writing**

Ensure your new service agreement clearly defines the scope of work, timeline, payment schedule, change-order procedures, and dispute resolution process. Never begin work on a handshake. A detailed contract is your single most important legal safeguard when changing providers mid-project.

09**Coordinate a Smooth Site or Property Handover**

Arrange a walkthrough with both your outgoing and incoming contractors — or conduct separate walkthroughs — to ensure nothing is missed during the transition. Confirm who is responsible for materials currently on-site, and update site access credentials, alarm codes, and key holders as needed.

10**Update Your Insurance Provider and Property Records**

Notify your homeowner's or facility insurance provider of the contractor change and confirm that the new contractor's certificates of insurance are on file. Update any HOA or building management records as required. Keeping stakeholders informed prevents gaps in coverage and avoids administrative complications down the line.

✓ Next Steps

Switching contractors is a significant decision — but with the right preparation, it can be the fresh start your project needs. Keep all documents organized, communicate clearly and professionally, and don't hesitate to seek legal advice if disputes arise. Visit **switchmycontractor.com** for more resources, provider comparisons, and expert guidance every step of the way.

| # | Action Item | Key Consideration | Priority |
|----|-------------------------------------|--|-----------------|
| 01 | Review current contract | Termination clauses & notice periods | Do First |
| 02 | Document completed work | Photos, invoices, punch-list items | Do First |
| 03 | Secure permits & warranties | All documents belong to property owner | High |
| 04 | Settle payments owed | Pay only for completed, documented work | High |
| 05 | Issue written termination notice | Certified mail or tracked email | High |
| 06 | Obtain project status report | Materials, sub-contractors, open orders | Medium |
| 07 | Vet replacement contractors | License, insurance, bonding, references | High |
| 08 | Sign a comprehensive new contract | Scope, timeline, payment schedule | Do First |
| 09 | Conduct site/property handover | Access credentials & on-site materials | Medium |
| 10 | Update insurance & property records | COIs on file, HOA/building management notified | Medium |