

BEFORE REQUESTING THE DEPOSIT

Give the customer a proof packet they can actually check.

Eight items that reduce avoidable uncertainty about who is doing the work, who is being paid, and what the first payment covers.

NOT A BADGE OR ENDORSEMENT

A completed packet does not mean Prove the Pro verified, approved, certified, or recommends a contractor. Customers should inspect current official records and resolve discrepancies independently.

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01

Business identity

Legal business name, any trade name on the quote, a physical or service address, and one consistent business contact route.

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05

Written agreement

Business identity, dates, scope, payment schedule, change-order process, cancellation terms, and required notices.

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02

Applicable credential

Current license or registration number and official lookup link when required, or a clear explanation of the route that applies.

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06

Matching payee

Payment instructions naming the business on the agreement. Explain and document any different recipient before requesting money.

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03

Insurance contact

Current proof naming the contracting business plus an insurer or agency contact the customer may use to seek confirmation.

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07

Deposit purpose

Amount, percentage of the total, what it purchases or reserves, and how later payments connect to defined work or materials.

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04

Detailed quote

Project address, scope, materials or allowances, price, exclusions, and the person or company responsible for the work.

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08

Verification time

A reasonable opportunity for the customer to inspect records, ask questions, and resolve mismatches without manufactured urgency.

KEEP CLAIMS NARROW AND DOCUMENTS CURRENT

Do not describe a license, insurance certificate, registration, or this checklist as a guarantee of future work or coverage. Requirements vary by trade and location, and records can change after they are checked.

