

CHECKLIST: BECOMING AN INTERIM EXECUTIVE

Use this checklist to make sure you're prepared to be an interim executive.
None of these items are required until the client has signed the statement of work.

STEP 1. WORK STYLE ASSESSMENT

This executive management tool helps us understand natural drive and motivation in terms of strengths in the workplace. It allows us to better connect you with the situations where you can provide the company with the best success.

STEP 2. REFERENCE CHECK

A reference check will be requested.

STEP 3. BACKGROUND CHECK

A background check will be requested.

STEP 4. VERIFICATION OF BUSINESS ENTITY

Please send the name (or proposed name) and state so we can verify. We will not accept DBA or Sole Proprietorship, you must have one of the following: LLC or S Corp., C Corp., Inc. or Partnership.*

STEP 5. W9

W9 signed with your EIN and entity name (or LLC or S Corp., C Corp., Inc. or partnership), and signature. Let us know if you need this sent to you via DocuSign and if you are using an SSN instead of an EIN.**

STEP 6. INSURANCE REQUIREMENTS

Thinking of getting insurance for your client work? Here are some recommendations:

- [Bunker Insurance](#) (has policies that are specific to independent contractors)
- [Hiscox Insurance Online](#)
- [Bolt Insurance Online](#)
- [Insurance Solutions](#) (if you prefer a broker ask for Cheryl McDowell, 949-348-2050)

*The Entity (LLC) for your business can be secured online through the Secretary of State of your State or the State of your choice. You can also use a service like LegalZoom.com.

**[CLICK HERE](#) to obtain a free EIN for Federal purposes from the IRS.
[Why and EIN is better for contractors than an SSN.](#)