

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

[CLICK HERE](#) to take the 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

Please gather 3-5 references. All references must be current within the past 5 years and must be a supervisor (if CEO role, board member) or client.

STEP 3. BACKGROUND CHECK

You will receive an email from USAFact to complete. A credit check will be required for financial roles.

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

Once our client has executed the Statement of Work, verification of your business's insurance is required. While you are free to use any Insurance agency you choose, we currently have 4 sources that many of our Interim Executives have used:

- [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.