

Choosing an Umbrella Company – Checklist Form

Notes:

Checklist provided free of charge by www.ContractorCalculator.co.uk.

If you would like to suggest further information to be included on this form then please email us at operations@ContractorCalculator.co.uk

Further useful articles:

- [First time Contractors Guide](#)
- [Choosing an Umbrella Company](#)
- [Moving from a Ltd Company to an Umbrella](#)

Company and Contact Details:

| | |
|--|--|
| Company name: | |
| Tel: | |
| Contact name + position: (Accountant / Sales etc) | |
| Date spoken to: | |

Company history and Information:

| | |
|------------------------|--|
| Year started: | |
| Number of contractors: | |

Services offered:

| | |
|---|--|
| Salary only and/or Salary + dividends: | |
| Payment frequency: | |
| Speed of invoicing: <i>(Time to raise invoice after receiving timesheet)</i> | |

| | |
|---|--|
| Speed of payment: <i>(Time from submitting timesheet to receiving payment)</i> | |
| Tie in Period / lock in fee: <i>{Is there a minimum period}</i> | |
| Client charters: <i>(Guarantees of service level or money back etc)</i> | |
| Insurances included: <i>(Professional indemnity etc)</i> | |
| Agencies they work with: <i>(Do they work with yours?)</i> | |

Fees and Calculations:

| | |
|---|--|
| Fees: <i>(Fixed/Percentage etc)</i> | |
| Same day payment fee: <i>(CHAPS transfer)</i> | |
| Calculation Details: <i>(Net take home pay based on hourly/daily rate and legitimate expenses)</i> | |

Other Comments & Information: