

# SUBCONTRACTOR CHECKLIST PACKET

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## INCLUDED IN THIS PACKET

- Subcontractor Setup
- Form W-9

# SUBCONTRACTOR SETUP FORM

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Before paying a subcontractor or allowing them to begin work, have them complete this form and submit all required documents.

This helps you:

- Confirm the subcontractor is an independent business—not your employee.
- Ensure they carry their own liability and workers compensation insurance.
- Collect the information needed to issue a 1099-NEC at year-end.
- Collect proper documentation in case of an audit, insurance issue, or dispute.

Keep this form on file with your records.

# SUBCONTRACTOR SETUP FORM

PLEASE COMPLETE ALL SECTIONS

## PRIMARY CONTACT INFORMATION

### Business Contact Information

Legal Business Name: \_\_\_\_\_ DBA (if applicable): \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Email Address: \_\_\_\_\_ TAX ID#: \_\_\_\_\_

#### Type of Entity: Please check ONE

- Sole Proprietor or Single Member LLC     C Corp     S Corp  
 Partnership     Trust/Estate     Other:

## EMERGENCY CONTACT INFORMATION

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## INSURANCE AGENCY INFORMATION

Insurance Company: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## NATURE OF BUSINESS (BRIEF DESCRIPTION)

Description of Work Performed: \_\_\_\_\_

Does your business have employees?     Yes     No

Is the owner covered or excluded from the Workers Comp Policy?     Covered     Excluded

## REQUIRED DOCUMENTATION (PLEASE INCLUDE WITH THIS FORM)

COMPLETED W-9 FORM

CERTIFICATE OF LIABILITY INSURANCE

Policy #: \_\_\_\_\_ Policy Dates → From \_\_\_\_\_ To \_\_\_\_\_

CERTIFICATE OF WORKERS COMP INSURANCE

Policy #: \_\_\_\_\_ Policy Dates → From \_\_\_\_\_ To \_\_\_\_\_





# FORM W-9

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## **Don't Pay a Subcontractor Without It**

Before you pay any subcontractor, make sure they complete and return a W-9.

You'll need the information to issue them a 1099-NEC at year-end. Without it, you can't properly report the payment(s)—and if the IRS reviews your records, they may treat the worker as an employee, leaving you on the hook for employment taxes, back withholding, and penalties.

**Protect your shop. Get the W-9 first.**





## Compliance isn't optional.

The cost of getting it wrong is real.

Compliance slips don't just mean paperwork—they bring stress, wasted time, and costly setbacks. We help you stay protected so you can focus on running your business.

### BOOK A DISCOVERY CALL

A straightforward conversation  
focused on your goals.



[kaizencpas.com/contact-us](https://kaizencpas.com/contact-us)

More Tools and Resources:  
[kaizencpas.com/resource-center](https://kaizencpas.com/resource-center)