

Contractor Compliance & Renewal Checklist

A practical renewal tracker for general contractors, HVAC, plumbing, electrical, roofing and specialty trades.

Company / Business	Review Date

How to use: Check each item when current and compliant. Record the responsible owner, expiration/renewal date, and any follow-up notes.

1	Core Business & Entity Documents	Owner	Expires	Notes
☐	General business license (city / county / state)			
☐	Business privilege license			
☐	Certificate of good standing			
☐	DBA / fictitious name registration			
☐	Annual state filings / reports			
☐	Foreign state registrations (if applicable)			
2	Contractor & Trade Licenses	Owner	Expires	Notes
☐	General contractor license			
☐	Specialty contractor license (HVAC, Plumbing, Electrical, Roofing)			
☐	Qualifying party license			
☐	Individual trade licenses			
☐	Continuing education (CE) certificates			
3	Construction Permits & Operational Licenses	Owner	Expires	Notes
☐	Construction firm license			
☐	Local building permits			
☐	Electrical permits			
☐	Plumbing permits			
☐	Temporary jobsite permits			
4	Insurance, Bonds & Client Proofs	Owner	Expires	Notes
☐	General liability insurance			
☐	Workers' compensation insurance			
☐	Commercial auto insurance			
☐	Umbrella / excess liability			

☐	Builder's risk insurance			
☐	Surety / license bonds			
☐	Certificates of insurance (COIs)			
☐	Additional insured endorsements			

5	Safety & Jobsite Compliance	Owner	Expires	Notes
☐	OSHA training certificates			
☐	Jobsite safety plan			
☐	First aid / CPR certifications			
☐	Equipment inspection records			
☐	Hazard communication (HAZCOM) plan			

6	Client & Vendor Qualification	Owner	Expires	Notes
☐	Vendor onboarding documents			
☐	Client insurance requirements			
☐	Compliance attestations			
☐	NDAs / MSAs			
☐	Client-mandated proof of renewals			

7	Certifications & Trade Accreditations	Owner	Expires	Notes
☐	Trade association memberships			
☐	Manufacturer certifications			
☐	Minority / veteran owned certifications			
☐	Quality or safety certifications			

8	Tax, Payroll & Regulatory Filings	Owner	Expires	Notes
☐	Sales tax permit			
☐	Payroll tax filings			
☐	Unemployment insurance registration			
☐	Business property tax filings			

9	Vehicles, Equipment & Assets	Owner	Expires	Notes
☐	Vehicle registrations			
☐	Vehicle inspections			
☐	DOT numbers / decals			
☐	Equipment licenses and calibrations			

10	Digital & Technology	Owner	Expires	Notes
☐	Domain registrations			
☐	SSL certificates			
☐	Software licenses			
☐	Cybersecurity training certificates			

Final Review / Follow-Up			Owner	Due Date
Outstanding items / renewals requiring action				
Additional notes				