



Financial Set Up Checklist

*NOTE: PMs should download and use the attached [checklist](#) before each job

	Item	Due Date	Assigned To
	Owner Contract Executed		
	Owner Insurance Requirements Identified		
	Builders Risk Policy Received		
	LKCO insurance cert provided to owner		
	SOV/ Req reviewed and accepted by owner		
	Changes billed/ tracked above or below the line		
	Project enrolled in CDI		
	Estimating handoff meeting conducted		

Financial Set Up Checklist (continued)

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	Item	Due Date	Assigned To
	Allowances/ Related Costs identified & established		
	GC/ GR staffing plan reviewed & confirmed		
	SOV/ Req set up and loaded into system		
	Budget approved and loaded into system		
	Labor rates confirmed and sent to accounting		
	Exhibit E insurance requirements set up		
	Subcontractor labor rates reviewed & approved		
	Preconstruction invoices complete & submitted		