License and qualifying-agent transition checklist

Map each place your crews work to the business entity, trade classification, qualifier and authority that controls its permits.

How to use this file

1. Complete a separate copy for each jurisdiction and business entity.
2. Send the authority your proposed ownership structure and request a written response.
3. Put the effective dates and party responsible for each filing in the closing calendar.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Illustrative outline — not legal advice; have your attorney draft final documents.

Define the current license

□ Record the contractor of record, license number, scope, expiration and whether the authority is state or local.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Confirm the qualifier’s employment, supervision obligations, trade scope and planned departure date.

Owner and target date _____

Evidence or exception _____

Next action _____

□ List permits open under the current license. Ask the issuing office how existing jobs reach final inspection.

Owner and target date _____

Evidence or exception _____

Next action _____

Test the buyer’s route

□ Describe the legal entity after close and ask which filings, examinations, approvals and insurance evidence apply.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Check whether a proposed replacement qualifier can supervise the relevant branches and what proof is required.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Capture the authority’s response date, contact, reference link and any remaining interpretation for counsel.

Owner and target date _____

Evidence or exception _____

Next action _____

Coordinate the handoff

□ Confirm the first date the buyer may bid, contract and pull permits in its own name.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Assign an owner for renewal, bond, insurance, local registration and fee payments.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Ask your attorney to document unresolved approval conditions before the parties set a closing date.

Owner and target date _____

Evidence or exception _____

Next action _____