

# ***Contractor Call Preparation Checklist***

*Collect this information and ask these questions before you sign anything.*

## **SECTION 1 · Collect before you call**

**Roof age and history**

Year installed, last repair date, any known leaks. Check closing documents or ask the previous owner.

Notes: \_\_\_\_\_

**Insurance info**

Your homeowners policy number and insurers claims phone number (in case the job is insurance-related).

Notes: \_\_\_\_\_

**Photos of problem areas**

Take photos from the ground - missing/lifted shingles, stained ceilings, gutters. Share via email or text.

Notes: \_\_\_\_\_

**Square footage (approx)**

Measure your homes footprint. Roofers will measure exactly, but a ballpark helps them budget their time.

Notes: \_\_\_\_\_

**Attic access location**

Contractors may need to inspect from inside. Know where your attic hatch is before they arrive.

Notes: \_\_\_\_\_

**HOA rules**

If you have an HOA, note any colour or material restrictions so you do not choose a banned product.

Notes: \_\_\_\_\_

**Permit history**

Prior permits (city building dept website) can reveal past work. Useful if you suspect unpermitted repairs.

Notes: \_\_\_\_\_

**SECTION 2 · Questions to ask when you call**

Are you licensed and insured in this state? Ask for the certificate number.

Answer: \_\_\_\_\_

Do you carry workers compensation? How many people will be on my roof?

Answer: \_\_\_\_\_

Will you pull the permits, or is that on me?

Answer: \_\_\_\_\_

Is a full tear-off included, or will you layer over existing shingles?

Answer: \_\_\_\_\_

What brand and product line of shingles do you recommend for my area and why?

Answer: \_\_\_\_\_

Will you replace the underlayment and ice-and-water shield, not just the shingles?

Answer: \_\_\_\_\_

How do you handle decking damage found mid-job? What is the per-sheet price?

Answer: \_\_\_\_\_

What does the warranty cover and who honours it if you go out of business?

Answer: \_\_\_\_\_

What is the payment schedule? Never pay more than 10-30 percent upfront.

Answer: \_\_\_\_\_

How do you protect my landscaping and gutters during the job?

Answer: \_\_\_\_\_

What is the realistic timeline, and what delays are most common?

Answer: \_\_\_\_\_

Will I get a written, itemised contract before work begins?

Answer: \_\_\_\_\_