



## Contracts Checklist

This document is to assist us in tailoring each contract to your individual need.

Detailed, prompt and accurate instructions from you are fundamentally important.

Please read this form carefully and complete as much of it as possible before we meet, to save time and help manage your legal costs.

### A. Your Contact details

Your name: [Click here to enter text.](#)

Name of Company: [Click here to enter text.](#)

Company registration: [Click here to enter text.](#)

Number: [Click here to enter text.](#)

Address: [Click here to enter text.](#)

Postcode [Click here to enter text.](#)

Phone:

Office: [Click here to enter text.](#)

Mobile: [Click here to enter text.](#)

### B. Parties to the contract

Name of the employee(s): [Click here to enter text.](#)

### C. Commencement of employment

- 1) Is this a fixed term contract or one that will end in accordance with the termination clause?



Details: [Click here to enter text.](#)

- 2) Will any previous employment count toward this employment?

Details: [Click here to enter text.](#)

- 3) How long would you like the probationary period to be? Do you want to extend it? If yes, by how long?

Details: [Click here to enter text.](#)

**D. Job title**

- 1) What is the employee(s) job title

Details: [Click here to enter text.](#)

- 2) Is there a job description? Please give a brief description of their duties

Details: [Click here to enter text.](#)

- 3) Who will they report to?

Details: [Click here to enter text.](#)

**E. Place of work**

- 1) Where will the employee be required to work?

Details: [Click here to enter text.](#)

Will they be required to travel for their job or work at another branch?

Details: [Click here to enter text.](#)

Will they be required to work abroad? If yes, what are the arrangements for this?

Details: [Click here to enter text.](#)

**F. Salary**

- 1) What will the employee be paid?

Details: [Click here to enter text.](#)

- 2) How will they be paid? Weekly? Monthly?

Details: [Click here to enter text.](#)



- 3) Will their salary be reviewed? If yes, when?

Details: [Click here to enter text.](#)

- 4) Is there a bonus scheme? Will they be considered for it?

Details: [Click here to enter text.](#)

What benefits will the employee be entitled to?  
(Car/contributions/gym membership etc.)

Details: [Click here to enter text.](#)

**G. Hours of work**

- 1) What hours would you like the employee to work?

Details: [Click here to enter text.](#)

- 2) Will the employee be required to work overtime? Will this be paid?

Details: [Click here to enter text.](#)

- 3) Is the employee likely to work more than an average of 48 hours each week?

Details: [Click here to enter text.](#)

- 4) Is there a staff handbook or other rules/procedures in place?

Details: [Click here to enter text.](#)

**H. Holidays**

- 1) How many days holiday is the employee entitled to? (Please note the statutory minimum is 5.6 weeks, inclusive of bank holidays) will the basic amount increase with length of service?

Details: [Click here to enter text.](#)



2) What is your holiday year?

Details: [Click here to enter text.](#)

3) Will you allow the employee to carryover their unused holidays?

Details: [Click here to enter text.](#)

4) How many days holiday can be taken at once and how much notice would you like the employee to give?

Details: [Click here to enter text.](#)

5) Do you want the right to ask an employee to take their remaining holiday during their notice period?

Details: [Click here to enter text.](#)

6) Will the employee be required to work on bank holidays?

Details: [Click here to enter text.](#)

7) Do you have an annual shut-down period? Will the employee be required to take holiday during this time?

**I. Incapacity**

1) What kind of sick pay scheme do you operate?

Details: [Click here to enter text.](#)

2) If it is a company sick pay scheme:

- i) Is there a qualifying period?
- ii) What rate will the employee be paid during sickness?
- iii) Will their pension continue to accrue during sickness?
- iv) Do you want to reserve the right to ask the employee to undergo a medical examination? If yes, who will pay for it?

Details: [Click here to enter text.](#)

**J. Termination of employment**

1) How much notice do you want the employee to give?



Details: [Click here to enter text.](#)

- 2) Do you want to have the right to terminate the employment in lieu of notice?

Details: [Click here to enter text.](#)

- 3) Is there any specific examples that you would like to list for being able to terminate the employee's employment without notice (summary dismissal)?

Details: [Click here to enter text.](#)

- 4) What points do you want to make in relation to retirement? *(Please note that there is not compulsory age by which you can ask the person to retire without contravening the Age Discrimination rules)*

Details: [Click here to enter text.](#)

**K. Disciplinary and Grievance procedures**

- 1) Do you already have disciplinary and grievance procedures? If yes, where can they be found?

Details: [Click here to enter text.](#)

**L. Pensions**

- 1) What pension provisions do you have in place? *(There are new laws in place governing the introduction of pension for all eligible employees which will be dependent on the size of your company with specific deadlines in place for complying)*

Details: [Click here to enter text.](#)

**M. Collective agreements**

Are there any in place?

Details: [Click here to enter text.](#)

**N. Confidential issues**

Is there any specific information that you would like to protect even after the employee's employment has ended?



Details: [Click here to enter text.](#)

**O. Company property**

Will the employee be entitled to any company property as part of their job?

Details: [Click here to enter text.](#)

**P. Intellectual property**

Is there any copyright or intellectual property rights that you would like to protect?

Details: [Click here to enter text.](#)

**Q. Data protection and monitoring**

1) Do you need the right to be able to process the employee's personal data?

Details: [Click here to enter text.](#)

2) Do you need the right to be able to check the employee's emails/telephone etc.?

Details: [Click here to enter text.](#)

**R. Garden Leave**

Do you want to be able to ask the employee to remain at work or at home during their notice period?

Details: [Click here to enter text.](#)

**S. Restrictive Covenants**

1) How important is the employee to your business? Do you need to restrict what s/he can do when they leave your employment?

Details: [Click here to enter text.](#)

2) If you do wish to restrict what they can do when they leave, what in particular do you want to prevent?

Details: [Click here to enter text.](#)



**T. Additional information**

Please use this section to tell us any other information that you think is relevant. The contract is to be tailored to your exact request.

[Click here to enter text.](#)