



Personal Contract Evaluation Planner

Create action plans for contracts you currently have and anticipate signing in the future. This helps you stay organized and prepared.



Current Contracts to Review

Contract #1

Current

Contract Type

Select...



Provider/Company

Company name

Contract End/Renewal Date

mm/dd/yyyy



Monthly Cost

\$__

Key Terms to Review

Auto-renewal terms, cancellation policy, price changes...

Potential Issues Identified

Any red flags or concerns with current terms...



Action Plan

- ☐ Locate and read current contract terms
- ☐ Note renewal date on calendar
- ☐ Research competitor offers
- ☐ Prepare negotiation strategy

☐ Contact provider to negotiate/review terms

Contract #2

Current

Contract Type

Select...



Provider/Company

Company name

Contract End/Renewal Date

mm/dd/yyyy



Monthly Cost

\$____

Key Terms to Review

Auto-renewal terms, cancellation policy, price changes...



Anticipated Future Contracts

Future Contract #1

Upcoming

Contract Type

Select...



Expected Timeline

Select...



Key Terms to Research

What should you look for in this type of contract?

Potential Red Flags to Watch

Common problematic terms in this contract type...

Preparation Steps

How will you prepare before signing?



Preparation Timeline:

- 2 weeks before: Research standard terms and competitor offers
- 1 week before: Prepare list of questions and negotiation points
- Day of: Take time to read everything before signing

Future Contract #2

Upcoming

Contract Type

Select...



Expected Timeline

Select...



Key Terms to Research

What should you look for in this type of contract?

My Contract Review Commitments

I commit to doing the following before signing ANY contract:

Write your personal commitments here...