BARCHIESI LAW PLLC

PENNSYLVANIA CONTRACTORS / KEEP WITH YOUR PROJECT FILE

Contractor Claim: First Conversation Checklist

A demand arrived. An invoice is disputed. Start by organizing what you already have. Check off the records you locate; missing items can be discussed with the firm.

Deadline approaching? Call (215) 543-6788 directly. A callback request does not pause a deadline. Record when and how you received any notice or legal papers.

- [ ] **Notice & dates**

  Demand letter, complaint, lien notice, or insurer correspondence. Note the date and method received and any date printed on it.

- [ ] **People & project**

  Company name, project address, owner, subcontractors, suppliers, and other parties. Note who signed and in what capacity.

- [ ] **Agreements & changes**

  Signed contract, scope, exclusions, estimates, change orders, subcontracts, signature pages, and any personal guarantees.

- [ ] **Payments & job records**

  Invoices, payment history, receipts, permits, inspections, completion records, dated photos, site logs, emails, and texts.

- [ ] **Insurance & correspondence**

  Policies, endorsements, certificates, claim numbers, and insurer or broker communications. Ask counsel which notice requirements apply.

- [ ] **Your questions**

  What is being demanded? What records are missing? What do you want reviewed? Ask about next steps, document sharing, scope, and cost.

Before sharing: Keep original records and the full message threads. Ask the firm how to share documents after the initial intake; keep private project details out of the callback form.

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