

Contractor referral agreement

One referral. Clear terms. A record both businesses can keep.

DRAFT FOR REVIEW. General starting point, not legal advice or a statement that a referral fee is lawful. Have qualified local counsel adapt this sheet for the parties, work, location, and required disclosures before signing.

01 / THE BUSINESSES

Effective date: _____ Work location (state/country): _____

Referring business (legal name): _____

Receiving business (legal name): _____

02 / THE REFERRAL

Job/reference, location and work: _____

Referral sent on: _____ Acceptance deadline: _____

This sheet covers this referral only. The receiving business must accept the referral and fee in writing before a fee can be earned, and disclose any known existing relationship with the customer. Neither business guarantees a job or revenue.

03 / THE FEE AND PAYMENT

The receiving business pays the referring business the fee agreed below.

Choose one: ☐ No fee ☐ Flat fee \$_____ ☐ Percentage _____%

If percentage: calculation base and excluded amounts: _____

Fee is earned only when: _____

Payment due: _____ days after BOTH the earning condition and receipt of an invoice.

Cancellation, refund and partial-payment treatment: _____

04 / CUSTOMER CHOICE AND RESPONSIBILITIES

The customer chooses the service provider. Share only necessary customer information with permission or other lawful authority, and make required fee disclosures. Each business handles its own work, pricing, licenses, insurance and taxes. Neither may bind the other or negotiate insurance claims under this agreement.

This draft excludes public-adjuster and insurance-claim referrals, insurance-funded roofing referrals, real-estate/mortgage settlement, healthcare and other regulated referral arrangements. Use a separately reviewed agreement for those situations.

05 / RECORDS AND CHANGES

Keep the acceptance, agreed terms, invoice and payment evidence together. Pay directly between the businesses; if RefSource is used, it records terms and payment status and does not transfer the fee. Changes require both businesses' written agreement. Contact each other promptly about disputes; this sheet does not waive legal rights.

Notice contacts (name/email for each business): _____

Governing law and dispute venue (complete with counsel): _____

06 / AGREEMENT

Complete every applicable field (or write N/A), attach any agreed addendum, and keep a signed copy.

REFERRING BUSINESS

Signature: _____

Name/title: _____

Date: _____

RECEIVING BUSINESS

Signature: _____

Name/title: _____

Date: _____