

# E&O INSURANCE APPLICATION READINESS CHECKLIST

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Use this checklist to audit your production documentation before applying for Errors and Omissions insurance. Complete every item before submitting your application to minimize the risk of exclusions or rejection.

PRODUCTION INFORMATION	
Film Title	
Working Title (if different)	
Production Company / LLC	
Producer	
Total Budget	
Principal Photography Dates	
Current Stage	
Target Distributor(s)	
E&O Broker	
Target Application Date	

SECTION 1 — UNDERLYING RIGHTS AND SCREENPLAY			
✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Original screenplay — written by production's writer(s) with signed work-for-hire or assignment agreement		
<input type="checkbox"/>	Option agreement — if based on existing source material (novel, article, true story, stage play)		
<input type="checkbox"/>	Purchase agreement — confirming acquisition of underlying rights from rights holder		
<input type="checkbox"/>	Assignment of underlying rights to production entity — signed and dated		
<input type="checkbox"/>	All previous option/purchase agreements in chain — if rights changed hands before your production		
<input type="checkbox"/>	Writer agreement(s) — covering all writers who contributed to the screenplay		

<input type="checkbox"/>	Copyright assignment in writer agreement — confirming all rights transferred to production		
<input type="checkbox"/>	WGA registration — number recorded, certificate on file		
<input type="checkbox"/>	US Copyright Office registration of screenplay — registration number recorded		
<input type="checkbox"/>	Chain of title legal opinion — if chain is complex or involves multiple transfers		

## SECTION 2 — ABOVE THE LINE TALENT AGREEMENTS

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Director agreement — signed before production began		
<input type="checkbox"/>	Director agreement includes work-for-hire or full copyright assignment clause		
<input type="checkbox"/>	Lead cast Performer Agreement 1 — signed before filming began		
<input type="checkbox"/>	Lead cast Performer Agreement 2 — signed before filming began		
<input type="checkbox"/>	Lead cast Performer Agreement 3 — signed before filming began		
<input type="checkbox"/>	All additional principal cast — performer agreements signed before filming		
<input type="checkbox"/>	Producer agreement — covering all producers who contributed creative work		
<input type="checkbox"/>	Executive producer agreement — if executive producer has creative involvement		
<input type="checkbox"/>	All above-the-line agreements include right of publicity waiver		
<input type="checkbox"/>	All above-the-line agreements include distribution rights grant		
<input type="checkbox"/>	All above-the-line agreements include likeness rights for promotional materials		

## SECTION 3 — BELOW THE LINE CREW AGREEMENTS

✓	Item	Document / Reference	Status / Notes
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<input type="checkbox"/>	Cinematographer / DP agreement — includes work-for-hire or copyright assignment		
<input type="checkbox"/>	Film editor agreement — includes work-for-hire or copyright assignment		
<input type="checkbox"/>	Production designer agreement — includes work-for-hire or copyright assignment		
<input type="checkbox"/>	Costume designer agreement — if original costume design (not wardrobe only)		
<input type="checkbox"/>	Visual effects supervisor/team — work-for-hire agreements for all VFX contributors		
<input type="checkbox"/>	Colorist agreement — if colorist has creative input beyond technical service		
<input type="checkbox"/>	Sound designer agreement — if original sound design created for film		
<input type="checkbox"/>	All below-the-line crew on standard crew agreement — work-for-hire confirmed		
<input type="checkbox"/>	All crew agreements executed before work commenced		

## SECTION 4 — MUSIC CLEARANCES

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Composer agreement — covering all originally composed music		
<input type="checkbox"/>	Composer agreement includes work-for-hire status for all original compositions		
<input type="checkbox"/>	Composer agreement covers synchronization rights for all original music		
<input type="checkbox"/>	Complete music cue sheet — listing all music in film with timing, title, composer, publisher		
<input type="checkbox"/>	Synchronization license obtained for all pre-existing music (compositions)		
<input type="checkbox"/>	Master use license obtained for all pre-existing music (recordings)		
<input type="checkbox"/>	Written confirmation from royalty-free music provider that license covers film distribution		
<input type="checkbox"/>	Festival license confirmed to cover all distribution channels (not festival-only)		

<input type="checkbox"/>	Public domain status confirmed for any public domain music used		
<input type="checkbox"/>	All music licenses confirm worldwide, all media, in perpetuity coverage		
<input type="checkbox"/>	No uncleared music identified in final cut		
<input type="checkbox"/>	Music supervisor sign-off on all clearances (if music supervisor engaged)		

## SECTION 5 — LOCATION AGREEMENTS AND PERMITS

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Signed location agreement for all principal filming locations		
<input type="checkbox"/>	All location agreements include authority representation from grantor		
<input type="checkbox"/>	All location agreements include distribution rights grant — worldwide, all media, in perpetuity		
<input type="checkbox"/>	All location agreements include insurance provisions — production GL, location owner as additional insured		
<input type="checkbox"/>	Government filming permits obtained for all public locations		
<input type="checkbox"/>	Location release or permit for all exterior shots of identifiable private property		
<input type="checkbox"/>	Historical property permits — if applicable, from relevant preservation authority		
<input type="checkbox"/>	No contested or jurisdictionally complex locations without legal review		
<input type="checkbox"/>	International location agreements governed by specified law and jurisdiction		
<input type="checkbox"/>	Certificate of insurance provided to all location owners prior to filming		

## SECTION 6 — RELEASES AND CLEARANCES

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Background performer releases — signed by all extras who appear in the film		

<input type="checkbox"/>	Personal appearance releases — for all real people who appear in interviews or documentary segments		
<input type="checkbox"/>	Model releases — for any people whose likeness is used in a non-performance context		
<input type="checkbox"/>	Archival footage licenses — for all archival clips used in the film		
<input type="checkbox"/>	Photograph licenses — for all still photographs that appear in the film		
<input type="checkbox"/>	Script clearance report — commissioned and reviewed		
<input type="checkbox"/>	All script clearance issues resolved — releases obtained or content changed		
<input type="checkbox"/>	Title clearance report — commissioned and reviewed		
<input type="checkbox"/>	Title cleared for use in all target distribution territories		
<input type="checkbox"/>	Trademark clearance — for any trademarked names, logos, or products depicted		
<input type="checkbox"/>	Right of publicity clearance — for any real people depicted in the film		

## SECTION 7 — COPYRIGHT AND REGISTRATION

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Screenplay registered with US Copyright Office — registration number on file		
<input type="checkbox"/>	Finished film registered with US Copyright Office — or registration in process		
<input type="checkbox"/>	Copyright notice included in film credits and all distribution materials		
<input type="checkbox"/>	All copyright assignments recorded with US Copyright Office — or recording in process		
<input type="checkbox"/>	WGA registration number on file		
<input type="checkbox"/>	Chain of title file compiled and organized — all documents in one location		
<input type="checkbox"/>	Chain of title reviewed by entertainment attorney — if chain is complex		

## SECTION 8 — PRODUCTION INSURANCE DOCUMENTATION

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	General Liability Insurance policy — certificate on file		
<input type="checkbox"/>	Workers Compensation Insurance — certificate on file		
<input type="checkbox"/>	Cast Insurance — if required by production		
<input type="checkbox"/>	Negative Film / Digital Media Insurance — if required by production		
<input type="checkbox"/>	Equipment Insurance — certificate on file		
<input type="checkbox"/>	All location owners named as additional insureds on GL policy		
<input type="checkbox"/>	All certificates of insurance provided to relevant parties prior to filming		
<input type="checkbox"/>	No claims made against any production insurance policies during production		
<input type="checkbox"/>	All insurance policies current — not lapsed		

## SECTION 9 — PRODUCTION ENTITY AND FINANCING

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Production LLC or corporation formed and in good standing		
<input type="checkbox"/>	LLC Operating Agreement executed — all members signed		
<input type="checkbox"/>	All investor agreements executed — Investment Agreements signed before funds received		
<input type="checkbox"/>	Production bank account opened in name of production entity		
<input type="checkbox"/>	No claims or disputes with investors outstanding		
<input type="checkbox"/>	All co-production agreements executed — if applicable		
<input type="checkbox"/>	Production entity owns or controls all rights in the film		
<input type="checkbox"/>	No liens or encumbrances on the film or its rights		

## SECTION 10 — PRE-APPLICATION REVIEW

✓	Item	Document / Reference	Status / Notes
<input type="checkbox"/>	Complete chain of title file compiled and reviewed		
<input type="checkbox"/>	All gaps in chain of title identified and addressed		
<input type="checkbox"/>	E&O broker selected and application process initiated		
<input type="checkbox"/>	Target distributor E&O requirements confirmed		
<input type="checkbox"/>	Required coverage limits confirmed — minimum \$1M per claim / \$3M aggregate		
<input type="checkbox"/>	Required deductible confirmed — typically maximum \$10,000 for major platforms		
<input type="checkbox"/>	Required policy period confirmed — typically minimum 3 years from first release		
<input type="checkbox"/>	No known claims or threatened claims relating to the film — or disclosed to broker		
<input type="checkbox"/>	E&O application package assembled — all documents organized and ready		
<input type="checkbox"/>	Entertainment attorney reviewed chain of title — if chain is complex or uncertain		

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## NOTES AND OUTSTANDING ITEMS

Use this space to note outstanding items, gaps identified, and steps taken to resolve them.

This checklist is for educational purposes only and does not constitute legal advice or guarantee E&O insurability. Requirements vary by distributor, insurer, territory, and production. For production-specific guidance, consult a licensed entertainment attorney and a qualified E&O insurance broker.

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