



# EP SET CHECKLIST

EVERYTHING AN EXECUTIVE PRODUCER NEEDS TO MANAGE A PRODUCTION

The EP role on an independent production is uniquely demanding. You're overseeing creative, financial, legal, and logistical responsibilities — often simultaneously. This checklist covers everything you need to manage before, during, and after principal photography. Use it every production. Customize it for your project.

## PRE-PRODUCTION — BUSINESS & LEGAL

### Entity & Contracts

- Production company LLC or entity formed
- EIN obtained from IRS
- Business bank account opened
- Fiscal sponsor confirmed (if applicable)
- Production agreement signed with director
- Co-producer agreements executed
- Option agreement or rights clearance for source material

### Union / Guild

- Determine if production is union (SAG-AFTRA, IATSE, DGA) or non-union
- SAG-AFTRA low-budget agreement filed if applicable
- Ultra-Low or Modified Low Budget tier confirmed
- Core required paperwork from guild obtained

### Insurance

- General liability insurance secured
- E&O; (Errors & Omissions) policy in place or planned
- Workers' comp coverage confirmed (check state requirements)
- Equipment insurance confirmed
- Location insurance riders added where required

## PRE-PRODUCTION — FINANCIAL

### Budget

- Locked production budget approved by all stakeholders
- Contingency line item confirmed (10–15%)
- Above-the-line vs. below-the-line totals reviewed
- Deferred payment agreements drafted where applicable
- Completion bond reviewed (if required by investors)

### Fundraising & Cash Flow

- All confirmed funding received or payment schedule locked
- Crowdfunding campaign closed and funds transferred
- Grant funds disbursed to production account
- Investor agreements and payment schedules signed
- Cash flow schedule built week-by-week for shoot period
- Petty cash system established with receipts protocol

## PRE-PRODUCTION — CREW & CAST

### Key Hiring

- Line producer or UPM hired and onboarded
- 1st AD hired and schedule reviewed/approved
- DP confirmed with deal memo signed
- Sound mixer confirmed
- Production designer / art director confirmed
- All HoD deal memos executed before shoot

### Cast

- All principal cast contracted
- SAG or non-union talent agreements signed
- Cast travel and housing arranged (if applicable)
- Minors' work permits obtained (if applicable)
- Intimacy coordinator hired (if applicable)

## PRE-PRODUCTION — PHYSICAL

### Locations

- All location agreements signed
- Location fees paid or scheduled
- Permit applications submitted and confirmed
- Location backups identified for key exterior locations
- Parking plan confirmed for cast, crew, and equipment

### Equipment & Logistics

- Camera package contracted
- Grip & electric package contracted
- Sound package contracted
- Production vehicles arranged
- Catering / craft services vendor confirmed
- COVID or safety protocols reviewed (if applicable)

## PRODUCTION — ON-SET OVERSIGHT

### Daily Management

- Call sheets reviewed and approved nightly
- Daily production reports received and filed
- Budget actuals tracked against schedule daily
- Any overages flagged and addressed same day
- Safety briefing conducted on Day 1
- Set visit schedule communicated to investors/stakeholders

### Documentation

- Script supervisor reports collected daily
- Release forms signed by all cast (including extras)
- Location release forms signed at wrap of each location
- BTS photo/video release forms collected
- All SAG exhibit Gs and time cards tracked

## POST-PRODUCTION — WRAP & DELIVERY

### Financial Wrap

- Final cost report produced
- All vendor invoices paid and filed
- Petty cash fully reconciled
- Investor financial update prepared
- Tax incentive or rebate applications filed
- Completion report sent to fiscal sponsor (if applicable)

### Deliverables

- Chain of title documentation compiled
- All releases (cast, location, music, archival) organized
- E&O; insurance application submitted with documentation
- DCP and archival master stored in 2+ locations
- Festival strategy reviewed and submission list approved
- Distribution agreements reviewed before signing

**The EP who is organized is the EP who gets hired again.**

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