

Free
Resource

i t s g p f

FREELANCING CHECKLIST

Your 10-Step Checklist of Actions to
Take in your First 6 months Freelancing

Free
Resource

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DONE

A photograph of a dining table set for a meal. The table is covered with a white tablecloth and features several plates of food, including what appears to be a salad, a bowl of fruit, and a small dessert. There are also glasses of wine, a bottle of wine, and a vase of flowers. The background shows a window with blinds and a wall with a light switch.

Doing the

thing.

My name is Camila.

And I am so happy you are here.

My goal is to make creative careers more accessible and open to anyone that has a desire to pursue them.

itsgpf

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IDENTIFY YOUR "WHY"

2

DREAMLINE EXERCISE

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So you want to freelance...

The reason I decided to create this and offer it as a free resource is because, during my time as an independent creative, I've noticed how many of us hold onto **limiting beliefs** that keep us from even considering this line of work.

I don't believe freelancing is the right choice for everyone, but I want people to have the opportunity to make that decision for themselves, without being discouraged by the messages they've received over the years.

I'm content with where my career has taken me so far. However, there are several things I wish I had known, tools I wish I had access to, and mindsets I wish I had embraced earlier. In this resource, I'll share **10 of those things** that would have made my journey smoother, in hopes that they can help you on your own creative path. I hope you can learn from my experiences and avoid making some of the mistakes I made.

Some tips for this Workbook:

- Print it out! To avoid using all of your ink, print out pages 3-18.
- Use a highlighter and write all over the negative space on the workbook pages.
- Underlined text within the workbook will link to an external tool or resource.
- Results from this workbook will come from the work that you put in.

First, a pep talk

If you're here, I probably don't need to convince you about the benefits of working for yourself. But if you need an extra push, here's a specific, non-exhaustive list of things that this workstyle has allowed me to experience in the 5 years I've been doing it:

- Traveling through Europe for 3 months, hopping from country to country with my partner.
- Wearing pajamas all day, if I feel like it.
- Attending uncrowded yoga classes at noon on weekdays while others are stuck in their 9-5 jobs (suckers).
- Not worrying about "recent layoffs" or an "imminent recession" because I know I have full control over my list of clients and my own success (during these times, companies actually lean more heavily on contractors).
- Working with clients and on projects that truly energize me.
- Living wherever I want and working at any time of the day that suits me.
- Enjoying a healthy and spontaneous lifestyle. If I want to go for a walk at any time of the day, I can. If a friend needs a last-minute phone call to chat, I can be there for them.
- Making an average of \$110k for the past three years consistently (after taxes and business expenses).
- Pursuing my latest interests on a whim. If I want to join a ceramics studio to boost my creativity, I can make it happen.
- And so much more...

These are just a few examples of the freedom and opportunities that come with working for yourself. The possibilities are endless, and I'm excited to share more insights to help you navigate this journey.

I want you to have your own list of experiences that align with your dream life, as it may differ from mine. So, in the spirit of setting you up for success, I've compiled a list of what I consider to be the ten most crucial steps to take within the first six months of embarking on a freelance career. These steps will give you the best chance at achieving success in your chosen path. However, it's important to note that this is not a comprehensive guide to your first decade as a freelancer or business owner. It's just a starting point to get you on the right track.

You may already be doing some of these, so if you are, that's amazing, just check it off, and move to the next point.

1

IDENTIFY AND CLARIFY YOUR MOTIVATION, YOUR "WHY."

This can encompass practical aspirations like "earning more money" or "attaining the time freedom I've longed for throughout my career." It can also encompass more abstract desires, such as "feeling a deeper connection with my creativity and the world around me."

All motivations hold equal value as long as they resonate with your authentic self.

EVERYTHING UNDERLINED WITHIN THE WORKBOOK PORTION IS LINKED TO A HELPFUL RESOURCE

Action:

If you have a printed copy of this guide (recommended), take a moment to write down your reasons in three succinct sentences below:

If you have not printed it out, do this in your journal.

2

DREAMLINE

Let's dive into the Dreamline exercise, inspired by Tim Ferriss' "[4-Hour Workweek](#)." I can't stress enough how much of a game-changer this step was for me, and I believe it can have a profound impact on your journey too.

Goals are great, but the Dreamline exercise takes it up a notch by transforming your dreams into actionable steps while encouraging you to think BIG.

For our purposes, we'll focus on a 6-month Dreamline exercise.

Step 1: Brainstorm. Set a timer for 5 minutes and let your imagination run wild. Write down everything you can possibly dream of. Don't hold back.

Step 2: Put the dreams you came up with in one of three categories:

-Having: List the things you dream of having, does not have to be limited to material wants.

-Being: Name the roles, jobs, identities what you wish for. For example, a great dancer, or parent.

-Doing: List the things you dream of doing and the things you want to experience—for example: visiting Bali, skydiving, etc.

Step 3: Edit. Now, it's time to ensure that everything you include in your Dreamline aligns with your authentic self. As Tim Ferriss puts it, "If you really want a Ferrari, don't put down solving world hunger out of guilt." Likewise, if owning a Ferrari doesn't resonate with you and it's just a status symbol, leave it out. This step requires self-awareness and staying true to your wants.

Step 4: Figure Out Costs: Now, think about how much these goals might cost you. Do some research to get a realistic idea of the investment required. This helps you understand what you're getting into. Also come up with what your current fixed costs are.

Step 5: Complete the Dreamline Exercise on the following page.

Fill out all the categories using the dreams and costs you landed on in steps

1-4. For the being category, you'll have to convert each goal to a related

action. This diagram serves as a roadmap to your aspirations. [Here](#) is a helpful article about this process. For a [sample dreamline, click here](#).

Action:

Fill out Dreamline Exercise on the next page.

IN 6 MONTHS I DREAM OF:

<p>Step 1: Having</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>Step 5: Cost</p> <ol style="list-style-type: none"> 1. 2. 3. 4. <p style="text-align: center; border: 1px solid black; padding: 2px;">A =</p>	
<p>Step 2: Being</p> <ol style="list-style-type: none"> 1. → 2. → 3. → 4. → 	<p>Step 2: Doing</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>Step 2: Cost</p> <ol style="list-style-type: none"> 1. 2. 3. 4. <p style="text-align: center; border: 1px solid black; padding: 2px;">B =</p>
<p>Step 3: Doing</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>Step 3: Cost</p> <ol style="list-style-type: none"> 1. 2. 3. 4. <p style="text-align: center; border: 1px solid black; padding: 2px;">C =</p>	

TARGET MONTHLY INCOME

A + B + C + (1.3 X MONTHLY EXPENSES)

TOTAL MONTHLY INCOME:	+		=	
-----------------------	---	--	---	--

STEPS NOW	TOMORROW	DAY AFTER

3

TRACK ALL MONEY IN AND OUT

Make it a habit to diligently track ALL your business income and expenses.

(And don't forget to consistently set aside money for taxes and savings.)

Start doing this from the very first paycheck, even if it's less than \$100. I'm grateful that I started early, but I deeply regret not beginning sooner. Here's the system I recommend and personally use: For invoicing, get into the routine of adding a line to your spreadsheet every time you send an invoice to a client. When that invoice gets paid, go back to your records and add the date you received it (this way, you are always on top of what invoices have not been paid yet).

When it comes to business expenses, open your calendar and block out one hour every Sunday for a financial wellness date with yourself. During this time, review all your transactions across all payment methods and input the relevant information for your business expenses. If you stay consistent, it should only take you 15-20 minutes/week.

To make things even easier, I've created a user-friendly **Freelance Financial Tracker** based on the system I've been using for years. It has helped me maintain financial peace of mind, especially during tax season. You'll thank yourself if you adopt this approach or something similar.

While taxes are essential and require careful planning, I firmly believe that establishing a **substantial and automated savings system** is equally as important. You can't produce your best creative work when you're constantly in **fight-or-flight mode** due to financial worries. If you're looking to get your finances in order (which is especially important when you're self-employed), I highly recommend reading Ramit Sethi's book, "**I Will Teach You to Be Rich**". It's a valuable resource that can transform your relationship with your personal finances.

Action:

Set up your freelance financial system, either do it yourself or use a template. Then add time blocks on your calendar for business expense tracking.



SHOWCASE YOUR WORK

Make sure you have a platform to showcase your work. I debated whether a portfolio website is an absolute must from the start, and I've come to the conclusion that it's not. However, **it's crucial to have a place where your work can exist and be easily discovered by potential clients.** Luckily, we have platforms like Instagram and other social media channels that are super easy to set up. Starting here is perfectly fine (I didn't have a proper website for my work until a year and a half after starting).

Eventually, you'll want to have your own website with your unique domain. Make a note in your calendar or planner to set this as a goal once you feel comfortable investing in it. Having your own domain will also allow you to have an email format like name@businessname.com, which adds a really cool and professional touch.

Action:

Create Instagram and Pinterest accounts for your work.

5

CAST A WIDE NET

Securing your first clients is not an exact science. I hesitated to write about this, but honestly, I believe that I've attracted all my dream clients through manifestation. [Here's](#) a link to **To Be Magnetic**, a program that dives deep into neural manifestation. They also emphasize the importance of **aligned action**, which means taking steps forward while trusting that the universe will support you, instead of just sitting back after writing down your list.

Some actionable advice:

- Let everyone in your network know that you're now accepting clients. While it might not land you a client right away, someone may recommend you when the timing is right.
- Keep sharing your work on social media. I know that many of the dream clients I've worked with discovered my work on Instagram or Pinterest. Don't create in isolation and expect people to stumble upon your work. Put it out there for them to see.
- Nurture relationships with fellow creatives. If you're a designer, connect with stylists, photographers, makeup artists, copywriters, and others in related fields. They're more likely to mention you in conversations. I'm not saying it can't happen with people in your own industry, but it's statistically less likely.
- If you feel a strong connection with a person or brand and want them as a client, don't hesitate to send them an email. You never know what might happen. This has worked for me on two occasions in the past.
- Be aware of your expertise when starting out and price your services accordingly. Consider taking on lower-paying opportunities if you're not yet confident in certain areas. It will give you a chance to learn "on the job."
- Reach out to your existing network. My first packaging project came from my high school best friend who was starting a food brand. I learned as I went, and she took a chance on me. Now, I can confidently take on various packaging clients in industries ranging from beauty to beverages.

Remember, getting your first clients requires a combination of belief in yourself, strategic actions, and a willingness to put yourself out there. Stay open, persistent, and keep refining.

The right clients will come your way.

Action:

Choose 3 of the bullet points above and take the advice given.



PERFECT YOUR PORTFOLIO

Craft the perfect portfolio to attract your dream projects.

Go through your current portfolio or profile and delete anything that doesn't align with the type of project inquiries you'd want to receive. You want your portfolio to be a **magnet for your dream clients**, so it's crucial to have a focused representation of your best work.

Think about what you want to attract into your life. If you aspire to work with beauty brands, it's best to exclude unrelated work, like car advertising. If you include car advertising work, those are the clients that you will get, and likely take, creating more car related work, that you will not want to promote.

You are better off slowly creating passion projects that align with you and your dream clients. In the long run, this will be way better.

Action:

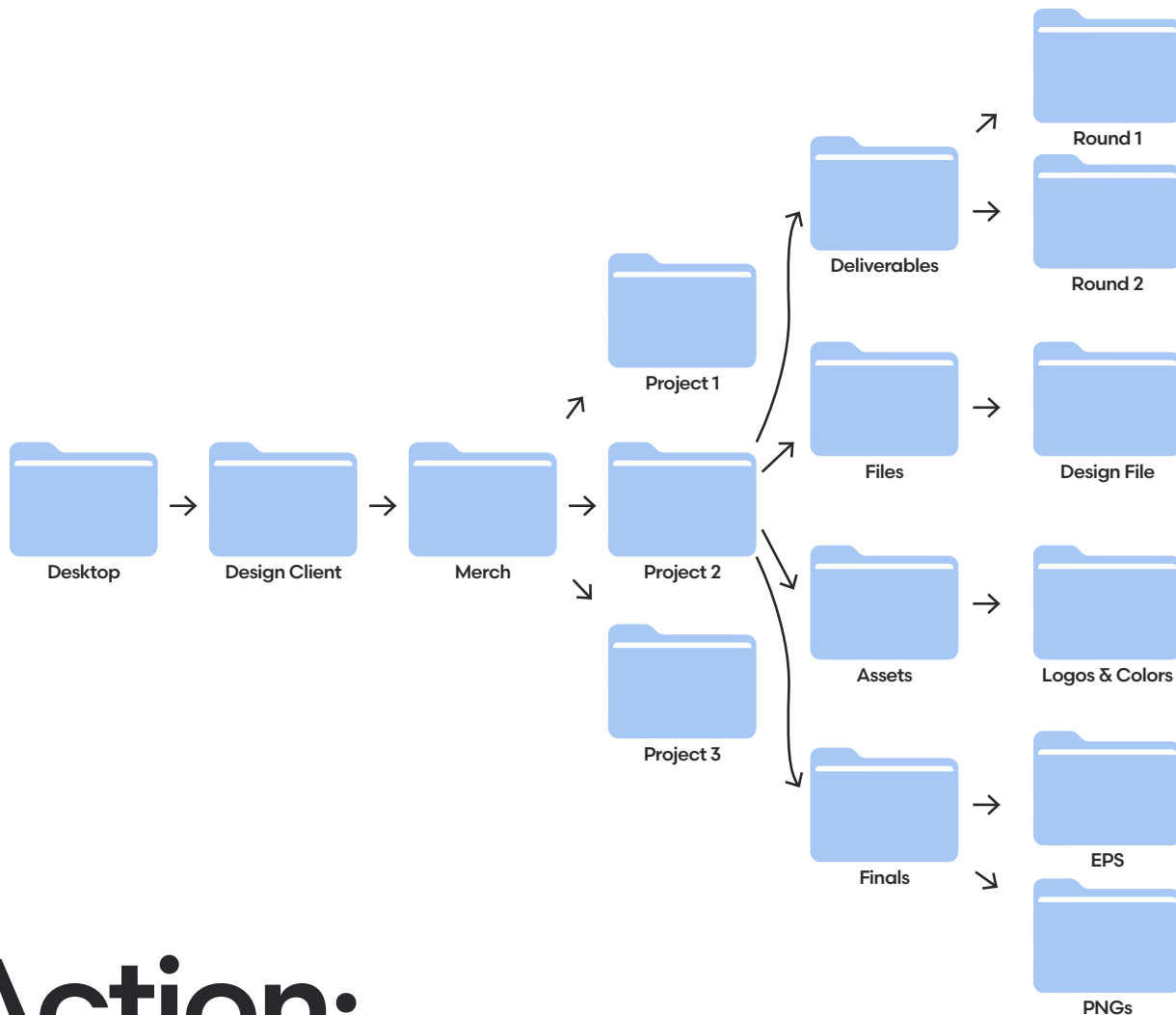
Remove any current projects that don't not align with your ideal work and add at least one piece of work that does. If you have none, create from scratch.

7

NAIL THE ART OF FILE ORGANIZATION

Listen, when you're running your own creative business, organization becomes something that can make you stand out from the crowd. If your system currently is to shove everything in your downloads folder or desktop, it is only a matter of time until you lose an important file or your laptop gives up on you.

Right now, take a moment to create a file structure on your computer or hard drive that suits your needs. Now, I'll give you an example of a popular offering—merch design—and how its file structure might look (check out the diagram below).



TIP: ALWAYS DATE FINAL DELIVERABLES

Action:

Set up a sample file system that would work for your types of projects.



NICHE DOWN

Take advantage of the power of niching down (but don't overdo it).

Somewhere along the way, I gained the confidence to say "no" to projects that didn't align with my creative inclinations, and it made **all the difference**. The moment I started consistently showcasing work that reflected my style, **attracting clients became a lot easier**.

At the start, it's important to explore different projects and discover what truly sparks your passion. Don't rush into narrowing down your niche yet. Take on a variety of projects as you figure out what you enjoy most. However, here's the tip: **After completing a project, take a moment to reflect on how it made you feel**. This reflection will naturally refine your intuition and guide you toward the projects that truly resonate with you.

I mention this because it's never too early to start contemplating your niche. I have seen plenty of creatives try to be for everyone, and they end up both extremely drained and with the leads they don't want. By finding your unique place and focusing on projects that genuinely ignite your enthusiasm, you'll attract clients who appreciate your authenticity.

It's all about carving out your own space.

DON'T TRY TO BE A
JACK OF ALL TRADES.
IT IS LIKELY THAT THIS
BEHAVIOR IS COMING
FROM A LACK MINDSET

Action:

Journal about your most recent project and how it made you feel during and after.



FOSTER COMMUNITY

I want to take a moment to give some well-deserved shout-outs to the women who have made all of this possible, my fellow designers:

- [Vanessa Tadeo](#)
- [Hailey West](#)
- [Olivia Stauber](#)
- [Kelly Franks](#)
- [Eva Buechler](#)
- [Kayla Homenok](#)
- [Jazz Meurer](#)
- [Abby Vanprooyen](#)

Go check them out, follow them, hire them, befriend them, consider them as mentors, and more.

There are highs and lows in every creative journey, and having a solid network of people who genuinely care about you and support you is crucial. To my angels, I love you all.

Action:

Reach out right now to 5 people you have been following on Instagram and set up a time to chat in person if they are local to you, and over zoom if they are not. You might only vibe with one person out of those 5 people, but that is still extremely valuable.

10

GET LEGAL

Have a solid contract in place.

Saved the best (and most expensive) for last. **Most of my early mistakes fall into this category.** While I'm not providing legal advice, I highly recommend checking out [Chandler's page](#), she is an amazing resource.

When you start working as a contractor, you'll quickly realize how terrible the standard contracts used by brands for independent contractors are. It's nothing personal, really. Why would they prioritize creatives? They already have a lot on their plates managing their brands. In my opinion, it's our responsibility as freelancers to look out for our needs and establish healthy boundaries. One of the best investments I've ever made was purchasing a design specific contract template from Chandler 3 years ago. You can use code [CAMILA for \\$10 off](#). She has several offerings for all types of creative careers.

I still use this for every project, making small tweaks along the way to adapt it to my evolving boundaries.

Action:

Invest in legal advice and/or in a solid contract that protects you, the creative, and has your best interests in mind.

That's it!

HERE ARE SOME BONUS STEPS AND RESOURCES

Bonus Steps

- Practice what you do **every single day**. One of the most common questions I received in my first three years was how I quickly became skilled at what I do. My answer: How can you not improve when you're doing it all day, every day?
- If you are over 26, find a health insurance plan via [healthcare.org](https://www.healthcare.org).
- If your freelance business generates over 50k, consider forming an LLC.
- Outsource taxes for peace of mind, I personally use H&R BLOCK
- Consistently nurture existing client relationships.
- Keep taking courses and reading relevant books.
- Update your dreamline exercise every 3-6 months.

Additional Resources

Books (favs bolded)

- [**4 Hour Workweek**](#)
- [**Big Magic**](#)
- [Seeking Wisdom](#)
- [Loving What Is](#)
- [**A New Earth**](#)
- [Artist's Way](#)
- [The Go Giver](#)
- [Shoe Dog](#)
- [Atomic Habits](#)
- [A World Without Email](#)

Creative Tools

- [Laptop with as much storage as you can afford](#)
- [Hard drive](#)
- [Notebooks](#)
- [Printer](#)
- [Ipad and Apple Pencil](#)

Other Resources

- [To Be Magnetic](#)
- [Olivia Herrick Design Blog](#)
- [Expanded Podcast](#)
- [Kel Lauren Youtube Videos](#)
- [Skinny Confidential Podcast, Business Episodes](#)
- [ITSGPF Freelance Starter Bundle](#)
- [Conscious Spending Plan \(CODA\)](#)

A little discount for ya!

FREELANCE STARTER KIT

20% OFF

Freelance Starter Kit

Freelance Starter Kit

invoice

INVOICE # : 4400000
DATE : 04/26/2022
TERMS : (Net 30 - Business Day)

YOUR NAME OR COMPANY
Your Name
Name@company.com
1234 NW Business Lane,
Los Angeles, CA 90011

BILLED TO
Client Name
Client@company.com
1234 NW Business Lane,
Los Angeles, CA 90011

INVOICE OF SERVICES

DESCRIPTION	QUANTITY	RATE	AMOUNT
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000
Service Description	111	\$000	\$000

TERMS & NOTES
This invoice is a legal receipt of invoice only and does not constitute an offer of any services. Please refer to your contract for terms and conditions.
FOR PAYMENTS VIA CHECK
Check #123456789
FOR OBJECT DEPOSIT
Bank Name: ABC Bank
Account # : 1234567890
FOR BILL PAYMENT
Your phone is an email!

sub-total: \$1111
tax rate %: \$000
total: \$1111
DATE : 04/26/2022

LOVED CREATED WITH YOU

RETAINER PROPOSAL
Your Name or Company

DESIGNER
Your Name

CLIENT
Client Name

DATE
03/03/000

CONTACT
Client Email

HOURS RETAINED/MONTH	HOURLY RATE	MONTHLY VALUE	SAVINGS	N/A
NO RETAINER	\$00	N/A	N/A	N/A
10	\$95	\$950	\$1,000	\$50
20	\$90	\$1,800	\$1,900	\$500
30	\$85	\$2,550	\$1,650	\$450

This retainer is a [3-month contract]. Hours unused at the termination of the retainer are forfeited. Hours in excess of the retainer amount are charged at the retainer rate. There is a [2-hour level] or additional services the designer can issue at the retainer rate. Projects included under the retainer are limited to design services the designer is able to provide. A [20% cash fee] will be applied to time spent working on deliverables received within 48 hours. 50% of the postage price agreed upon will be invoiced the 5th of each month, remaining balance will be invoiced on the last day of the month.

A 30-day notice is necessary to terminate the retainer contract by either party.

total: \$TBD

The rates in this proposal begin on Month Day Year.

RETAINER CONTRACT
Your Name or Company

DESIGNER
Your Name

CLIENT
Client Name

DATE
03/03/000

CONTACT
Client Email

HOURS RETAINED/MONTH	HOURLY RATE	MONTHLY VALUE	SAVINGS	N/A
NO RETAINER	\$100	N/A	N/A	N/A
10	\$95	\$950	\$1,000	\$50
20	\$90	\$1,800	\$1,900	\$500
30	\$85	\$2,550	\$1,650	\$450

This retainer is a [3-month contract]. Hours unused at the termination of the retainer are forfeited. Hours in excess of the retainer amount are charged at the retainer rate. There is a [2-hour level] or additional services the designer can issue at the retainer rate. Projects included under the retainer are limited to design services the designer is able to provide. A [20% cash fee] will be applied to time spent working on deliverables received within 48 hours. 50% of the postage price agreed upon will be invoiced the 5th of each month, remaining balance will be invoiced on the last day of the month.

A 30-day notice is necessary to terminate the retainer contract by either party.

total: \$1111

The rates in this proposal begin on Month Day Year.

Freelance Financial Tracker [YYYY]

File Edit View Format Data Bank Categories Help

100% 100% 100% 100% 100% 100% 100% 100% 100% 100%

Set-up (start here)

Client	Project Name	Invoice Date	Invoice Number	Amount	Payment Received Date	Payment Received Amount
Client #1	Project Name	4/1/2022	AI1	\$1,000.00	4/15/2022	\$400.00
Client #1	Project Name	4/15/2022	AI2	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI3	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI4	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI5	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI6	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI7	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI8	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI9	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI10	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI11	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI12	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI13	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI14	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI15	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI16	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI17	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI18	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI19	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI20	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI21	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI22	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI23	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI24	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI25	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI26	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI27	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI28	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI29	\$1,000.00	4/30/2022	\$400.00
Client #1	Project Name	4/15/2022	AI30	\$1,000.00	4/30/2022	\$400.00

Freelance Financial Tracker [YYYY] - Summary - [YYYY] Business Expenses - [YYYY] Business Expenses

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