



California Executive Severance Negotiation Worksheet

A practical worksheet for executives, managers, and high-earning employees reviewing a severance offer.

1. Initial Review

Item	Done	Notes
Do not sign immediately	<input type="checkbox"/>	_____ _____
Confirm the review deadline	<input type="checkbox"/>	_____ _____
Save the agreement and all attachments	<input type="checkbox"/>	_____ _____
Calendar the response date	<input type="checkbox"/>	_____ _____
Decide who will communicate with the company	<input type="checkbox"/>	_____ _____

2. Compensation and Benefits Review

Item	Done	Notes
Salary continuation or lump-sum severance	<input type="checkbox"/>	_____ _____
Bonus / incentive compensation	<input type="checkbox"/>	_____ _____
Commission, sales credit, or draw reconciliation	<input type="checkbox"/>	_____ _____
RSUs, stock options, or vesting treatment	<input type="checkbox"/>	_____ _____
COBRA / health coverage subsidy	<input type="checkbox"/>	_____ _____
Vacation, PTO, final wages, and expense reimbursement	<input type="checkbox"/>	_____ _____



3. Terms That Usually Deserve Attorney Review

Item	Done	Notes
Release of claims	<input type="checkbox"/>	_____
Civil Code section 1542 waiver	<input type="checkbox"/>	_____
ADEA / OWBPA waiver if age 40 or older	<input type="checkbox"/>	_____
Arbitration or forum selection language	<input type="checkbox"/>	_____
Confidentiality and non-disparagement	<input type="checkbox"/>	_____
Non-compete / non-solicitation / customer restrictions	<input type="checkbox"/>	_____
Clawback, repayment, or cooperation obligations	<input type="checkbox"/>	_____

Negotiation Tracker

Term	Original Offer	Requested	Final
Salary continuation	_____	_____	_____
Bonus / incentive compensation	_____	_____	_____
Commission / sales credit	_____	_____	_____
RSUs / stock options	_____	_____	_____
COBRA or health coverage	_____	_____	_____
Reference / announcement language	_____	_____	_____

My Leverage Checklist

<input type="checkbox"/> Protected complaint	<input type="checkbox"/> Age 40 or older
<input type="checkbox"/> Medical leave or accommodation issue	<input type="checkbox"/> Strong performance reviews
<input type="checkbox"/> Commission dispute	<input type="checkbox"/> Equity at stake
<input type="checkbox"/> New supervisor or reorganization	<input type="checkbox"/> Timing suggests retaliation or pretext
<input type="checkbox"/> Unequal treatment	<input type="checkbox"/> Unpaid wages / bonus issue



4. Key Facts, Goals, and Evidence

What happened, and what facts make the termination or layoff feel legally or factually wrong?

What documents or witnesses support the leverage points above?

What outcome would make the severance package acceptable?

Severance Negotiation Roadmap

The offer is the starting point - the leverage analysis decides the path.



A severance agreement is worth slowing down for. If the offer involves meaningful compensation, equity, commissions, medical leave, age-related issues, retaliation concerns, or language you do not fully understand, Ruggles Law Firm can review the agreement and help you evaluate the practical leverage before you sign.

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This worksheet is for general informational purposes only and is not legal advice. Reviewing the worksheet does not create an attorney-client relationship.