

Checklist!

THE 4 MUST-HAVES TO
LEGALLY PROTECT
YOUR COACHING
BUSINESS

Protect Your Passion

Hey there!

I'm glad you're here because it's my passion to help YOU #protectyourpassion and this free checklist is a great place to start!

At the center of any successful coaching business is a strong legal foundation that will protect you, your business, and your income.

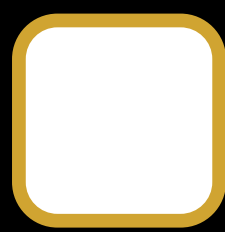
No matter how good your marketing is or how many subscribers you have, if you don't have your legal ducks in a row you could lose your business with one knock at the door and someone serving you with a lawsuit.

You've worked SO hard on your business! To be truly successful make sure all of your hard work is legitimized for long-lasting peace of mind.

Don't be one of those business owners that waits too long - waits to get sued, waits to lose the big sale, or waits until the client that didn't sign a contract decides to stop paying...

...use the checklist to see what you already have checked off and what you still need!

NOTE: The following is for educational purposes only and is not legal advice.



#1 Coaching Contract

What is it?

This is THE most important document you need in your business to lay your legal foundation and ideally you should have this in place before you collect your first dollar. A contract outlines the details of your coaching package, what you are providing (and NOT providing) and your payment policy. It includes clauses to protect your content (those awesome workbooks or other things you may give to help your clients!)

Why do I need it?

Your contract helps answer questions you may not even think to ask! For example, what happens if your client comes to you after 3 sessions and wants a refund after paying in full? Will you give it to her? Will you hold back a % as a service fee? What are you legally obligated to do?

For coaches, a super important part of a contract is having the proper disclaimers in place. A disclaimer protects you from claims or liability and is basically saying that you will not be held legally responsible for anything that may or may not happen to your client (or that they may try to blame you for)

What exactly does it do?

- ✓ PROTECT YOU FROM GETTING SUED (and spending \$150k+ in court)
- ✓ Protects your intellectual property
- ✓ Outline the terms of your coaching relationship & how you get paid
- ✓ Sets up boundaries



#2 Terms of Purchase

What is it?

A legally binding document that is an agreement between you and your customers, this is used for an online course, group coaching program, or membership site.

Terms of Purchase are located on your checkout page or next to your purchase button with language like:

By buying this product you agree to our Terms of Purchase

Why do I need it?

To protect your \$\$\$ my friend! Not only do these Terms hold your payment and refund policy, but they protect your business from being sued (and that will cost A LOT of \$\$\$). It also includes disclaimers to limit any liability, outlines the terms of your program, and protects your intellectual property!

What exactly does it do?

- ✓ Protects your SALES. Includes your payment & refund policy (what happens if someone buys it and changes their mind?)
- ✓ Protects the content you're creating for your program
- ✓ Includes disclaimers to protect you and your business from being sued

*LINK TO TERMS AT YOUR CHECKOUT BUTTON!

#3 Privacy Policy

What is it?

A privacy policy is basically a disclosure document that informs (and therefore protects) users. It's a statement you're making to visitors of your website about how you gather information about them and what you intend to do with it.

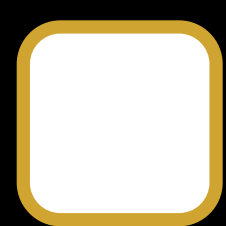
Why do I need it?

A privacy policy is a legally required and a **NECESSARY** part of your website protection. Because of California law and the General Data Protection Regulation (GDPR) in the EU, you can get fined if you don't have one. No thanks. Most countries have such laws.

Plus these days, if you don't have a privacy policy you can't get approved for Facebook Ads or some Google programs!

What exactly does it do?

- ✓ Explains to your visitors what you are (and are not doing) with their personal information.
- ✓ States that you won't share/sell/trade email addresses or personal information
- ✓ Lets users know if you use "cookies" or other tracking signals
- ✓ SPAM disclosures and requirements about marketing and collecting personal information from children younger than 13 years old.



#4 Website Terms & Disclaimers

What is it?

Your online home (aka your website) needs legal protection too! Just by having a website you are opening your business up to liability. These are documents that are all about protecting your business and content.

Why do I need it?

The disclaimers, similar to those in your contract, protect you from liability (that means losing dollars!) should anyone go off the rails and misuse the information you put out there (in blogs, newsletters, Facebook, etc) and end up physically, financially, or mentally injured. This is SO important for coaches, to let your audience know that you are not a therapist, doctor, lawyer, financial advisor, etc. You are NOT giving professional advice!

What exactly does it do?

- ✓ TOS (may also be called Terms of Use or Terms and Conditions) outline how your website should be used and what people can (and can't do) with your content
- ✓ Protects your intellectual property (newsletters, blog posts, opt-ins, videos, etc).
- ✓ Disclaimers protect your liability and keep you from being sued for Information you put out via website or newsletters

Protect Your Passion

My Legal Checklist

- 1:1 Coaching Contract
- Terms of Purchase for Group Programs or Courses
- Privacy Policy
- Website Terms & Disclaimers

How'd You Do? Don't worry if you didn't tick all those boxes, read on to learn how to get legit TODAY!

Destination Legal

Who am I?

Hey there! I'm Sarah and I help coaches like you #protectyourpassion™

A major obstacle for many coaches when starting their business is getting the legal situation straight. This is scary and a bit overwhelming but no worries, we've got this!

How can I help you get all of this done?

I have a legal template shop that sells all the documents above! Oh, and if you're thinking this all sounds scary and expensive, you are NOT the only one! Lucky for you Destination Legal is THE destination on the internet for coaches working online and wanting to get their 'legal ducks' in a row WITHOUT spending thousands of dollars!

You'll find everything you need to get legal over at Destination Legal - don't wait, I have the perfect Bundle for you to get your coaching business LEGIT today!



*Cheers to
Protecting Your Passion*

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