



legal basics: your first 3 Legal Steps

podcast episode 27 tip sheet

In this podcast episode we're talking about first 3 legal steps that many online entrepreneurs will need to take as they get started with their business. It's important to feel safe that you're not leaving yourself vulnerable or exposed as you work with 1-on-1 clients.

This episode is for you if you're a:

- New business or life coach.
- Holistic nutrition consultant, health coach, yoga instructor or personal trainer– but you're not a LICENSED practitioner.
- Website designer, graphic designer, or copywriter.
- Virtual assistant, Facebook ad specialist, social media manager.
- Spiritual healer, astrologist, numerologist, psychic or intuitive coach.
- Any online entrepreneur or heart-centered business owner who provides 1:1 SERVICES.

This podcast episode ISN'T ideal for you if:

- You sell things that aren't 1:1 services – like tangible goods or products.
- You are a LICENSED practitioner – like a medical doctor, functional medicine or integrative physician, nurse, physical therapist, chiropractor, massage therapist, naturopathic physician, or registered dietician.

Why is it important to take legal steps?

Legal documents protect you for 3 PRACTICAL reasons:

1. To limit your liability, exposure and risk.
2. To increase your professionalism.
3. To raise your credibility.

Legal documents support you **ENERGETICALLY** in 3 ways:

1. To shore up your boundaries.
2. To up your business vibe.
3. To attract your ideal clients.

Here are the first 3 legal steps to take to start building your legal foundation:
(Please note that this is just information to help you. You always want to talk with your own attorney to make sure that these steps are right for you.)

STEP 1: If you have a website, you'll want a Website Disclaimer.

Do you have a website (or will you have one soon)? Your first legal step is to create a **ROBUST** Website Disclaimer. This is your base layer of legal protection to help you disclaim your liability and get clear with your website visitors about who you are, what you do, and what you don't do so they don't get confused and come after you.

3 benefits of a Website Disclaimer:

1. It creates clarity.
2. It sets expectations.
3. It disclaims liability.

The main purpose of your Website Disclaimer is to disclaim your liability – that's why it's called a Website **DISCLAIMER** – by telling people that the content on your website is just information and education and not personalized or specific advice for them personally.

This step is aligned with the **root chakra** because it helps you feel safe, secure, and grounded at the base level with a base layer of legal protection as you launch your website to the world.



**If you need a Website Disclaimer for your site,
you can get more information at
lisafraley.com/diywebsitedisclaimer.**



STEP 2: If you work with 1:1 clients, you'll want a written Client Agreement.

If you're already getting your 1:1 services up and running, you'll want to use a Client Agreement with your clients. A Client Agreement is the written contract you use with 1:1 clients to give you strong legal backing, which helps you feel safe, secure, and confident.

3 benefits of a Client Agreement:

1. It spells out your policies IN WRITING.
2. It gathers your client policies IN ONE PLACE.
3. It makes your expectations, liability, and authority really CLEAR.

But a key reason to have a Client Agreement is to protect your INCOME. You want your Client Agreement to spell out your boundaries and policies around your time and your money - like what happens if a client misses a call, or they skip a payment, or they ask for a refund.

This step is aligned with the **sacral chakra** because it supports your income, abundance, trust, boundaries and relationships – all of which are associated with that chakra. It's aligned with the sacral chakra to protect your income so creativity and abundance can flow.



Do you have a solid, written Client Agreement to protect your income?

**If not and you need a Client Agreement, check out
lisafraley.com/diyclientagreement.**



STEP 3: If you're making money as a Sole Proprietor, you'll want to know about Business Registration & Taxes.

Now that you have 1:1 clients who are paying for your services, you have MONEY. YAY! Congratulations! That means that you're now a Sole Proprietor.

Now you need to (1) REGISTER your business locally, (2) DECLARE your income, and (3) PAY your taxes. I know – this isn't the fun part of the business, but you gotta pay your taxes.

3 benefits of registering your business and getting clear about taxes:

1. You set your business up right at the local level by letting them know that you are in business.
2. You comply with the law by filling out the right business and tax documents so you don't have to worry that you're not doing it properly.
3. You can plan ahead by saving money for your taxes all year so you can have peace of mind you won't be digging under your sofa cushions in April to pay Uncle Sam.

You always want to talk with your accountant and a lawyer to make sure you're making the right determination for your business on the financial and legal front.

Don't have an accountant on your team yet?

Feel free to download the free checklist of
"10 Questions to Ask When Hiring an Accountant"
that I've prepared for you at lisafraley.com/accountant.

I align this step with the **solar plexus chakra** because when you get clear on your FINANCES you act responsibly and it boosts your confidence, integrity and self-esteem. You can stand tall and feel empowered that your ducks are in a row as a Sole Proprietor.





**Do you need more info about how exactly
to go about registering your business locally
and wondering what you need to know about taxes?**

Find out more at lisafraley.com/biz-registration-for-sole-proprietors/.



As you can see, even if you're just starting out in your business, each of these 3 legal steps comes from the place of supporting you, cheering you on, and protecting you with lots of "Legal Love".

Have comments to share about this episode or questions about how to get your business legally protected based on where you are right now? Feel free to reach out to my team at clientlove@lisafraley.com. We'd love to hear from you!

With Legal Love,



**This information is for educational and informational purposes only.
It is not legal advice and it does not create an attorney-client relationship.**

For my full disclaimer, please visit lisafraley.com/disclaimer.



Lisa Fraley, JD, CHHC, AADP, is an acclaimed attorney, Legal Coach®, speaker and #1 Best Selling Author of "Easy Legal Steps...That are Also Good for Your Soul." With her unique blend of coaching, legal expertise, and spirituality, Lisa has supported thousands of heart-centered entrepreneurs and small business owners to protect themselves, their businesses and their brands through DIY legal templates, online legal courses and one-on-one services.

From sharing international stages with thought leaders like Kris Carr and Gabrielle Bernstein to being featured on hundreds of podcasts, webinars, radio shows and bonus calls, Lisa has made it her mission to help every single small business owner understand that the law can be accessible, empowering, loving, and even spiritual. When she's not saving the world (with Legal Love) one contract at a time, she's posting free legal tips and connecting with her tribe at lisafraley.com.