



## Don't miss these 5 sections in your Client Agreement

### podcast episode 36 tip sheet

You may already know that if you work with 1-on-1 clients, you want to use a written Client Agreement. But what does that Client Agreement need to say? Does your current Client Agreement have all of these sections spelled out in detail or are there huge gaps leaving you open to liability, risk and loss of income? This podcast episode is devoted to helping you NOT miss these 5 key sections that should be in every Client Agreement.

#### How does your Client Agreement protect you?

Your Client Agreement is your written contract with your 1-on-1 client that spells out all of your client policies in one place. It's a document that you sign and your client signs saying that you both agree to all of the terms laid out for your relationship. (That's why it's called an AGREEMENT.)

#### When do you use a Client Agreement?

Client Agreements are used for 1-on-1 programs or services offered by an online entrepreneur, coach or service provider. They aren't used by medical professionals for their in-office patients. They aren't generally used for large group programs – or for physical or digital products you sell through your website like video courses, audio courses, books, etc.

#### How does using a Client Agreement make you feel?

Using a written Client Agreement gives you strong legal backing, which helps you feel safe, secure, and confident—and it creates CLARITY for you and your client which causes fewer misunderstandings, headaches and Legal Pickles™ later.

There are LOTS of important sections in Client Agreements. A solid Client Agreement should be 4-5 pages long. LONGER IS BETTER. When you have a short, skimpy contract, it's too easy for things not to be spelled out and to have a lot of ambiguity which creates confusion and conflicts.

**Here are the 5 crucial components of Client Agreements that you don't want to miss:**

### **1. Be clear about payment.**

Yes, we're talking payment and money! The #1 reason to use a Client Agreement is to protect your INCOME. Spell out these 8 profit-protecting points:

1. What's the full investment for your program or service?
2. Do they pay in full or do you offer payment plans?
3. How and when you will be paid?
4. How you will invoice the client?
5. What types of payment you will accept?
6. What is your refund policy?
7. What happens if payment is late?
8. How will you receive any outstanding payments owed to you if your relationship ends?

### **2. Spell out your program description.**

When they're signing up to work with you, what all do they receive in their program or service? You want to list out everything they will receive so that you both are aware of what's included in your program. Give thought and attention to every element of the Program or Service Description and make sure you can and will deliver everything on your list.

Remember, your Client Agreement creates healthy BOUNDARIES for you – like guardrails and policies when it comes to your clients so I align it with energy center of the body known as the **sacral chakra**. When you use a Client Agreement, you're also energetically taking a conscious step to plug boundary leaks—like your money leaks, time leaks and energy leaks. Tightening up your boundaries with clear – but loving – client policies allows your creativity and prosperity to flow in abundance so you attract more money, clients, and abundance.



### **3. Include Disclaimer and limitation of liability language.**

Even if your client knows your credentials, it is critical that you include sections in your Client Agreement on disclaimers, limitations of liability and release of claims so that you don't expose yourself to undue risk. While you need to act professionally, legally and ethically in your role, you want to empower your client to take responsibility for their own decisions, actions and results. There are LOTS of disclaimers that you want to provide – and the reason is for CLARITY to keep you safe and avoid misunderstandings about what you do and don't do in your role.

### **4. Make sure you have a way out.**

Include a "termination" section. That sounds harsh, I know. Like you're turning into former Governor Arnold Schwarzenegger in The Terminator or something. That's not the case. You're merely giving yourself an "out" to get out of the Agreement if you realize that the client isn't honoring their responsibilities or they're refusing to make payment.

### **5. Keep confidentiality and privacy.**

Last but not least, your relationship with your client depends on building trust with each other. One way to do that is to state explicitly that you will maintain the confidentiality of all information shared by the client during your calls or appointments together. This will also encourage honesty, trust, and open participation by the client and can lead to better results for them because they feel safe to really show up and do the work that they came to you for help with.



#### **Action Step:**

**Take a moment to have a look at your OWN Client Agreement (if you are already using one) to see if each of these sections are strong, robust and thorough.**

**If you aren't yet using a Client Agreement, I hope you are seeing the importance of the document and you are feeling empowered now to put yours in place.**

**Learn more about a DIY Client Agreement at  
[www.lisafraley.com/diyclientagreement](http://www.lisafraley.com/diyclientagreement)**



Do you have questions about Client Agreements and these 5 key sections that you don't want to miss? Feel free to reach out to us at [clientlove@lisafraley.com](mailto:clientlove@lisafraley.com). My team and I would love to hear about your services and help you know how not to leave gaps in your Client Agreement.

**As always, I believe you're set free to do your best work and create anything that you want when you get legally covered in a loving way.**

Here's to getting legally enlightened!

With Legal Love,



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**For my full disclaimer, please visit [lisafraley.com/disclaimer](https://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](https://lisafraley.com).