

# The Business Blender

## Legal Essentials Checklist

A practical checklist to help founders identify the core contracts, policies, and disclosures their business may need to operate with more clarity, professionalism, and protection.

### How to use this checklist

This guide helps you identify the legal essentials that may apply to your business. Not every business needs every document. The goal is to help you see what belongs in your legal foundation, what belongs on your website, and what may be needed based on your business model.

Use the boxes below as a self-audit. Check what you already have, underline what needs review, and circle anything you need to create or update next.

### 1) Business foundation documents

- ■ LLC Operating Agreement
- ■ Corporate Bylaws / Shareholder Agreement
- ■ Partnership Agreement
- ■ DBA / Fictitious Name filings if applicable
- ■ Independent Contractor Agreement
- ■ Employee Agreement / Handbook if applicable
- ■ Non-Disclosure Agreement (NDA) if confidential information is shared
- ■ Intellectual property assignment language for contractors or team members

### 2) Client + customer contracts

- ■ Client Service Agreement
- ■ Coaching Agreement
- ■ Consulting Agreement
- ■ Done-for-You Services Agreement
- ■ Proposal / Statement of Work
- ■ Payment Terms
- ■ Late payment language
- ■ Refund / Cancellation / Rescheduling Policy
- ■ Scope of work + revision boundaries
- ■ Termination language
- ■ Limitation of liability language
- ■ Confidentiality clause

- ■ Intellectual property / ownership clause

### **3) Website legal essentials**

- ■ Privacy Policy
- ■ Terms of Use / Terms of Service
- ■ Disclaimer
- ■ Cookie notice or cookie disclosure
- ■ Accessibility Statement
- ■ Refund / Return / Cancellation Policy if you sell online
- ■ Subscription / auto-renewal terms if you offer recurring billing
- ■ Contact information clearly available on the site

### **4) Website form + data collection protections**

- ■ Consent language on contact / opt-in forms
- ■ Links to Privacy Policy and Terms near forms or checkout
- ■ Email marketing consent language where applicable
- ■ Clear explanation of what happens after submission
- ■ Secure payment processor terms if taking payments online
- ■ Data collection limited to what is actually needed

### **5) Marketing + visibility protections**

- ■ Testimonial / review disclosure language
- ■ Affiliate disclosure
- ■ Sponsored content disclosure
- ■ Earnings disclaimer if you reference income/results
- ■ Health / wellness disclaimer if relevant
- ■ Legal / financial disclaimer if relevant
- ■ Media release / testimonial permission if using client likeness or quotes

### **6) Digital product + education business protections**

- ■ Digital product terms
- ■ License terms for templates, downloads, or curriculum
- ■ Course / program participation terms
- ■ Membership terms
- ■ Community guidelines

- ■ No-guarantee / educational-use disclaimer
- ■ Chargeback / access termination language

## 7) Events, retreats, and in-person experience protections

- ■ Event terms and conditions
- ■ Retreat agreement
- ■ Assumption of risk / waiver language
- ■ Cancellation / transfer policy
- ■ Photography / video release
- ■ Vendor or speaker agreement
- ■ Emergency contact / health disclosure process if appropriate

## 8) Team + collaboration protections

- ■ Contractor agreement
- ■ Confidentiality agreement
- ■ IP ownership agreement
- ■ Referral partner agreement
- ■ Affiliate agreement
- ■ Joint venture / collaboration agreement
- ■ Guest expert / speaker agreement

## 9) Accessibility + trust essentials

- ■ Readable page structure
- ■ Form labels
- ■ Alt text process for images
- ■ Keyboard-friendly navigation
- ■ Sufficient color contrast
- ■ Captions/transcripts for media where needed

## Quick self-audit

- ■ Do I have a signed agreement for every paid offer?
- ■ Do my website policies match what I actually collect, sell, and promise?
- ■ Do my refund, cancellation, and delivery terms appear clearly before purchase?
- ■ Am I using testimonials, reviews, or claims in a way I can support?
- ■ Does my site feel accessible, transparent, and trustworthy?

## Recommended legal template resource

If you want a practical starting point for website policies and legal templates, The Business Blender recommends Artful Contracts.

Recommended options:

- [Website Protection Toolkit - \\$37](#)
- [Legal Template Shop](#)

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## Important note

This checklist is educational only and does not constitute legal advice. The contracts and policies your business needs depend on your business model, jurisdiction, audience, data practices, offers, and marketing methods. Review your documents with a qualified attorney before relying on them.