

On Your Terms Episode 92:
Sam's Sidebar Q&A
Which Legal Contract Do You Need

Sam Vander Wielen: Hey there, and welcome back to another episode of Sam's Sidebar, where I tackle your essential questions about starting and growing a legally protected online business in ten minutes or less, every single Thursday, here on the podcast.

So, this week, you're going to hear all about which contract or which policy you need for what situation in your business, because this is a question I get all the time. People are always reaching out saying I work with people in this way or I offer this kind of program or course, what kind of contract do I need for that? Where do I use it? So, today I'm answering all of your questions about which contracts you need and how to use them.

Okay. So, if you work with clients one-to-one, like you offer a three month coaching package or even a one-to-one session, a one-off session, something like that, either as a coach, a creative, a consultant, some sort of service provider, like an RD working with people or something like that, you need what I call the One-to-One Client Contract, because that's designed to be used between you and just one other person. And it can be somebody who owns business, it can be an individual, either way.

So, that contract template is really meant to be used in cases where you have a lot more of that personal one-to-one contact with somebody, maybe you're meeting by phone or Zoom or in person, and you need to address a lot of different stuff than you would if you were using a course contract or something like that.

On the other hand, if you're going to offer something like a group program, you need a Group Program Contract, because that provides legal language that's going to cover a lot of the different scenarios that come up in group programs, like people sharing information with other people in the room, or them having access to your intellectual property through some kind of portal. So, I cover all of that in a group program contract.

If you offer something like a course or a membership, like some kind of program that people can sign up for and purchase when you're sleeping, then I always recommend

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using my Terms of Use Contract, because the Terms of Use Contract, unlike the first two that I mentioned, is actually meant to be integrated at checkout versus sending to people to sign.

So, when you work with a client one-to-one or you run a group program or a mastermind, you should be sending people contracts to sign, to e-sign, and send back to you.

But when you offer something like a course or a membership or something that people can buy when you're sleeping, that's impossible to do because the whole idea is that this is supposed to be more automated and people are purchasing without you being involved. We still want to take the opportunity to have a contract, so in those cases we use Terms of Use, and we have people check that off or choose from a dropdown menu or something like that.

We only use that option, the kind of checkbox at checkout option when we have to. So, we don't use that as a default method. It's not just because it's easier than sending people to sign. We only use that when we absolutely have to.

Now, if you have a freebie, like you have freebies for download on your site or you have a blog or other kind of marketing materials that you're sending out to people, even if you have a YouTube channel, a podcast, anything like that, you need my Mini-Disclaimer Template, because that gives you the language that you need - just a little bit of language that you need - to put on there, that basically people need to be careful integrating your information and that they should always check with their own doctor or lawyer, accountant, therapists, whatever, before applying anything that you're about to tell them. So, that's really important. That's a very highly used legal template of mine, I would say.

Now, if you have a website, there are three policies that you need to have. You need to have a Privacy Policy, a Website Disclaimer, and Terms and Conditions. You need all

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three of those. We're legally required to have a Privacy Policy. The Disclaimer is going to be the most legally important one because it's going to protect you the most legally. And Terms and Conditions, it's great because that's where you're going to kind of put your boundaries and the rules of, not only using your website, but maybe even purchasing your products from your site, stuff like that. So, you need all three of those website policies.

If you want somebody to keep things confidential, like you're going to have meetings with a potential web designer or you have an idea for a funnel or a webinar and you're going to have a meeting with someone, and you want the contents of that meeting to remain between the two of you, so that if they meet with one of your competitors down the line, they don't say like, "Oh. Hey, Sam's doing this. Maybe you should try it that way," you would need an NDA, a Non-Disclosure Agreement. So, you could send that to people who you are working with, people who are on your team, anything like that, that when you need to keep stuff confidential, you're going to want an NDA. You'll be very glad you have one.

If you want to run an affiliate program, so if you want to have other people sell your stuff for you and pay them some sort of percentage, but you want to make sure that you control how they do it, that they know how much that they're getting paid, that they know that you can stop the program at any time, you need an Affiliate Contract.

If you're going to host events or book speaking engagements, like you want to go speak at conferences or speak at summits, you need a Speaker Agreement Contract. If you want to run a speaking event, something like that, you also would want that Speaker Contract, because you could send it to the speakers.

If you have a VA or you want to get a VA or a contractor, you would definitely want the Independent Contractor Agreement. If you're a copywriter, I have a Copywriter Contract for you to send your clients. If you're a social media manager, I have a Social Media Manager Contract for you to send to your clients. If you want to be able to use your

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client's testimonials legally in your marketing, you would use my Testimonial Release Template.

And the cool thing about all of these is that they all come with my How-To Video Tutorial, where I actually teach you how to fill them out in 15 minutes or less. So, they all come with their own video tutorial, where it's actually a screen share video of me walking you through how to fill it out. And the stuff that you're filling out in my contract templates is just your personal information, because I can't have that prefilled.

So, it's like your name, or where you live, or what your state is, or where there's an option for the number of days somebody has or the amount of money, stuff like this where you have options, I leave that there.

I give you a lot of examples in the contract template itself. And then, in the video tutorial, I kind of flush that out even more to really explain what I mean. And I also go through in the video tutorial and really explain to you what each of the different paragraphs mean, how it protects you, whether or not it's necessary, and how and where you could edit it if you really want to do for whatever reason.

So, I go through all of that in each of the templates in the How-To Video Tutorials which you get with every single template. You also get updates of every single template you purchase from me. So, if I make a change, you'll get that updated template by email. The same goes with the How-To Video Tutorial, and all that fun stuff.

So, you can visit my online legal template shop in the link below to get all the details, it's samvanderwielen.com/shop. I would love to see you there. If you have any questions at all for me about which template you need or how they can help you, please just reach out. Send me a DM on Instagram @samvanderwielen or shoot me an email, sam@samvanderwielen.com. I'm so happy to help. Otherwise, I can't wait to see you next week.

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