

5 Steps to a Legally Legit™ Business:

Free legal checklist to ditch the fear of messing up and confidently grow a business you're proud of!

Sam Vander Wielen





I'm Sam! A corporate-attorney-turned-health coach-turned-entrepreneur.

I was a big-firm corporate attorney for 5 years before I left in 2016 to start my own online health coaching business. I loved coaching, but I realized something was happening online that wasn't OK: entrepreneurs didn't have applicable and affordable access to legal contracts or info they needed to run a legally legit™ business.

Now, I empower you to take legal into your own hands with easy-to-use and understand DIY legal templates and my signature program, the Ultimate Bundle™.

I'm here to help break down the legal stuff you need to run an online business in a simpler, cozier way. That's my jam. (Actually, coffee is my jam - but this is definitely my business jam!)

Remember: this guide provides a general overview. It's not tailored to you, your business, or where you live. If you have specific questions about your business, it's always best to consult with a local attorney to find out exactly what you need.

If you have any questions, email me at help@samvanderwielen.com.
I can't wait to get to know you!

xo,
Sam

Legally Form Your Business



Pick Your Business Entity

Read more information on each [here](#).

- Sole Proprietorship
- LLC
- Partnership
- Corporation



Get an EIN

Now that you know what kind of biz you'll use, register for a (free) EIN # on the IRS' website [here](#).



Register Your Business

You will want to have these things ready when you register:

- EIN Letter/Number
- Business/ mailing address
- Business name exactly as you want it to appear
- Business phone number
- Business email address

Business Bank Account



Choose Your Bank

Things to consider when choosing a bank (you can call ahead and ask these things):

- Do they have free business checking?
- What (if any) fees do they have associated with business accounts?
- Is there a minimum balance requirement?
- Do they offer free checks?
- Do they offer free debit cards?
- Is there free online banking?
- Do they offer bill pay?



Open Your Account

Things you will need to take to the bank:

- EIN Letter/Number
- Formation documents (ie, Articles of Incorporation)
- Cash for initial deposit
- Identification (ie, license, passport)
- Any other registration documents or licenses



Connect it to PayPal

Business Insurance

Depending on the type of business you have, you'll want to look into getting professional liability insurance (especially important for coaches!) and possibly even commercial general liability insurance. Speak with an insurance agent who handles business policies and really understands what you do.

Find an Agent Near You

Questions to ask an agent

- Have they ever worked with someone with your type of business before?
- What type of policy do they think you need (based on what you tell them about your business)?
- What do those policies cover or not cover based on what you do?

Get a Quote + Choose Plan

Some things to ask after you get the quote...

- Is it a claim made or occurrence policy?
- What are the policy limits?
- How much is the deductible for each policy?
- How much are the premiums and can you break it into multiple payments?

Scope of Practice

So many clients come to me because they're afraid to be sued. I always tell them the same thing: stay within your scope of practice and be super clear and upfront about who are you, what your qualifications are, and what you can/can't do for people (since you're staying within the scope) and you should be OK. There's only so much we can do. Hey, that's what insurance is for, people!



Write Your Scope of Practice

Some things to consider:

- Does your state define what you are allowed to do?
- What are your "Umbrella Professions"?

Contracts

Complete your Contracts

You will want a contract for each type of service you provide - some examples include:

- 1:1 Client Services
- Group Program Contract
- Non-Disclosure Agreement
- Retreat Contract
- Affiliate Contract
- Independent Contractor Agreement
- Terms of Use (if you are selling digital products or courses)

Note: I offer all of these contracts as downloadable, fill-in-the-blank templates on my website at samvanderwielen.com/shop

Complete your Website Policies

All sites should have the following policies linked

- Privacy Policy
- Terms and Conditions
- Disclaimer

Note: Be sure you use a contract signing software that is E-Sign Act Compliant (they should note compliance on their site)

thank you!



Let's Connect

CONNECT on Instagram!

LEARN MORE about my DIY Legal Templates
and the Ultimate Bundle™ program!



FREE LEGAL TRAINING

**5 Steps to Legally
Protect and Grow Your
Online Business**

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cover business growth, legal, and
everything in between!

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