

Welcome to your Legal Map-Out Meeting!

During this session, we'll identify and prioritize your legal needs, ensuring you leave with a clear and actionable plan. Our priorities are categorized to help you focus on what requires immediate attention and what can be planned for the future in your business.

Here's a breakdown of the **importance levels** we'll be using:

HIGH!

Immediate // Need Right Now!

HIGH

Slightly Immediate // Should consider right now but can address later on, but no later than 1 year.

MOD

Not Immediate // Consider in the next 1 to 3 years based upon need.

LOW

Not Immediate at all // Can probably wait 3+ years and depends on how fast you grow.

CONTRACTS

COMMON AGREEMENTS/DOCS	NOTES	IMPORTANCE
1. Marketing & Branding Services Agreement 2.Event Planning & Coordination Agreement	NEED BOTH CLIENT SERVICE AGREEMENTS - W tog	GH
Independent Contractor/Vendor Agreement	For Ad	
Review of Other Agreements (Bank, Lease, Vendors, NDAs, etc	Onl	
Non-Disclosure Agreements “NDA’s”	Car	CLIENT DETAILS REMOVED Example layout only
Collaboration Agreement	Will	
Partnership Agreement/Collab Agreements	Ma	
Photography/Media/Social/ Marketing Release Form	IN (	
Template/Course Terms	IN FI	DD
Other Considerations	Maybe Event Waivers (in person workshops)	

INTELLECTUAL PROPERTY

COMMON AGREEMENTS/DOCS	NOTES	IMPORTANCE
Patent (Inventions)	CLIENT DETAILS REMOVED Example layout only	
Trademark (logo, slogan, etc.) [Federal or State Filing & Search]		
Copyright (works of art, written articles, etc.)		
Trade Secret (Really NDA)		
Trademark & Copyright Licensing Agreements		
Trademark Monitoring		
Trademark/Copyright Litigation		
Cease & Desist Letter		