



## 10 STEP ROAD MAP TO GROW YOUR BUSINESS, LEGALLY

### 1. Use solid contracts, in writing signed by both parties, for your agreements.

For example, use a contract with your:

- clients
- partners / founders / joint venturers / collaborators
- investors
- independent contractors or employees
- in-person retreats or events
- people you let view or use your copyrights or trademarks (ex.: blog, e-course or digital products, licensees)
- photos or videos if you can see the person's face
- affiliates / referral sources

### 2. Load the right documents on your website.

You MUST have a privacy policy if you collect personal information (if you are selling products or services, or have an e-mail opt-in). You may also need:

- terms and conditions (rules for website visitors);
- terms of use (rules for digital product or course purchasers);
- disclaimers; and/or
- FTC-required disclosures (if you receive money or products to write about something)

### 3. Protect your brand with a trademark:

- choose a great business or product name (fanciful or arbitrary, not generic or descriptive)
- search for exact *and similar* wording to be sure it's not already being used by another business selling similar products or services:
  - Google
  - your state's online business and trademark registry
  - USPTO federal trademark registry ([tess2.uspto.gov](https://tess2.uspto.gov))
- protect it with a federal trademark registration from the USPTO (start at [www.uspto.gov/trademark](https://www.uspto.gov/trademark), \$225-325 filing fee, hiring a lawyer to navigate the tricky, multi-step process is recommended).

### 4. Decide on the right corporate entity for you:

- sole proprietor (if you're a solopreneur with low liability risk);
- common law partnership (still put your agreement in writing!);
- LLC or corporation (for companies with higher liability risk)

5. **Get a free Employer ID Number (“EIN”) from the IRS, even if you don’t have employees.**  
This is like a social security number for your business, so you don’t have to use yours (even for a sole proprietor). Form an LLC or corporation *before* registering for an EIN (<https://sa.www4.irs.gov/modiein/individual/index.jsp>).
6. **Register with your city, county, and state for a business license and taxes.**  
Check your state’s business registration website - usually but not always the Secretary of State - or contact your local SBA office for tips (<https://www.sba.gov/content/find-local-sba-office>).
7. **Set up separate business bank accounts.**  
This will make keeping track of your business revenues and expenses, and calculating what you owe in taxes, a snap. You need your EIN for this step.
8. **Get the right insurance coverage. Consider:**
  - general liability;
  - professional liability, aka “errors and omissions” (for doctors, accountants, other professionals giving advice or providing services);
  - product liability; and/or
  - damage to business equipment
9. **Protect your creative works and create value with U.S. copyright registration** at [www.copyright.gov](http://www.copyright.gov) (\$35-55 filing fee, a lawyer is helpful but most mistakes forgiven so long as you don’t intentionally misstate information).
10. **Use other people’s content the right way to stay out of legal hot water.**  
Always ask permission and keep a record of where you found photos, videos, quotes, and other content that you use on your blog, website, other content and advertising. If you didn’t create it, you need permission.

**I’d love to help get your business legally legit. Learn more about scheduling a LEGAL ROAD MAP™ session here:** <https://awbfirm.com/legal-road-map-session/>



Autumn Witt Boyd hosts the Legal Road Map™ podcast, which helps business owners protect their rights and stay out of legal hot water, so they can confidently build their dream business. Autumn is an experienced lawyer who helps high-achieving and ambitious entrepreneurs solve their business, copyright, and trademark issues. She provides legal guidance as outside general counsel, copyright and trademark protection, contract negotiation, and problem solving. She loves helping entrepreneurs grow their dream business with smart collaborations and deals.

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