



Continuous Counsel

Start

\$2,644 (3 months)

- Packaged services for side hustles, heart projects, or early-stage solopreneurs who are just getting started and want to ensure they are set up for success with the right legal strategies and support in place.
- Review of all legal documents, from formation to contracts to intellectual property, to get your legal foundations secure.
- Review of website, social media, and online offerings, including terms & conditions, privacy policy, and disclaimers, to ensure your products or services are protected.
- Review of financial systems, from bookkeeping to cash flow to tax strategies, to make certain your business has the fuel to grow.
- Review business insurance needs and amounts to verify you have the proper levels of protection in place.
- Discuss estate plans, including business succession plans.
- Quarterly 90-minute review meeting
- Monthly 30-minute meetings to cover topics such as maintaining legal formalities; website terms & conditions, privacy policy, and disclaimers; using contract templates; IP protection; financial systems, bookkeeping, and tax; and insurance best practices.

Reset

\$5,744 (6 months)

Packaged services for professionals operating businesses with (i) one to three independent contractors or employees and (ii) a proven revenue stream, who want to ensure the right structures and systems are in place to support continued growth.

- Review of incorporation documents and corporate compliance
- Review of all existing contracts with vendors, service providers, affiliates, and clients/customers
- Review of all existing contracts with team members, including employee handbooks, plus interviews with key team members
- Review of all previously filed trademarks and copyrights

- Review of all terms & conditions, privacy policy, and disclaimers
- Review of key newsletters, online media, advertisements, and print material
- Review of financial systems and reports, including:
 - P&L statements
 - Cash flow statements, balance sheets, and income statements
- Meeting with bookkeeper and key team members
- Consult with CPA to review past tax returns
- Review personal and business insurance needs and amounts to verify you have the proper levels of protection in place.
- Establish business succession plan.
- Monthly 30-minute meetings to cover topics such as maintaining legal formalities; website terms & conditions, privacy policy, and disclaimers; using contract templates; IP protection; financial systems, bookkeeping, and tax; and insurance best practices.

Scale

\$16,488 (12 months)

- Established businesses that include (i) three or more independent contractors or employees and (ii) operate multiple revenue streams, who desire full personal and entity-level asset protection.
- Review of incorporation documents, corporate compliance, and record books for all entities
- Review of all existing contracts with vendors, service providers, and clients/customers, plus interviews with key external stakeholders
- Review of all existing contracts with team members, including employee handbooks, plus interviews with all team members
- IP audit and custom intellectual property protection plan
- Compliance audit of all website, social media, online media, advertisements, testimonials, marketing emails or newsletter, and print material
- Review of all standard operating procedures or guidebooks
- Diagnostic review of financial health, including:
 - P&L statements
 - Cash flow statements, balance sheets, and income statements
- Meeting with bookkeeper and key team members
- Consult with CPA to review past tax returns and discuss future tax strategies
- Consult with financial advisor
- Review of personal and business insurance needs and amounts to verify you have the proper levels of protection in place, including business, "key-man" or "buy-sell", employment practices, and life.
- Update estate plan, including business succession, transition, or exit plans.

CONTINUOUS COUNSEL

\$450 – \$4,495 per month. Please inquire.

New clients must undertake an audit prior to enrollment.