



As you know, small and mid-sized business clients require specialized, customized documents they can understand. Unfortunately, those documents aren't always easy to draft—unless you have Business Docx. Business Docx is the perfect solution for creating beautifully tailored and accurate documents with confidence and speed. You'll demonstrate your legal expertise and your business savvy—which your clients will surely appreciate.

You Get

- A robust library of resources and documents for a variety of business clients
- Client-friendly executive summaries (Buy-Sell, Operating Agreement, etc.)
- Contextual help and expert commentary to guide you through drafting
- Peace of mind knowing your documents are comprehensive and professionally formatted
- Confidence in your ability to provide excellent service consistently

Your Practice Gets

- Increased efficiency by eliminating costly, time-consuming manual drafting
- More time and bandwidth for new legal services and new clients
- A built-in support team to help your staff learn and develop new skills
- Consistent looking documents across the firm
- Curated content developed by experienced, highly trained attorneys

Your Clients Get

- Documents that are easy to understand
- Faster response time and document delivery
- Consistent, thorough communications
- More of your time and expertise
- Confidence in you



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Client Intake and Communications Suite

The Client Intake and Communications Suite provides you with the tools you need to stay in contact with your business clients. It includes an engagement letter to structure the attorney-client relationship, various subject-matter-specific communications to both clients and their advisors, and client worksheets to help gather targeted information about your clients' businesses. It also contains the documents needed to administer a subscription-based legal maintenance plan, including a Legal Maintenance Plan and related documents.

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Intake and Initial Planning

The Intake and Initial Planning folder contains letters, memos, and worksheets for communication with your clients and their professional advisors.

Business Protection Strategy Session Worksheet

The BPSS worksheet is homework for clients to fill out before your initial meeting .

50 Point Business Checkup Worksheet

The Business Checkup Worksheet is used when assessing an already-formed business. It provides a guide that you can color-code to provide your clients a graphical representation of the risks to which their businesses, as currently formed, may be exposed.

General Letter

The General Letter gives you a general template for corresponding clients or other parties involved in a business matter.

Client Intake Worksheet

The Client Intake Worksheet helps you gather essential information to begin a new client engagement.

Initial Meeting Letter

This client letter helps communicate your firm's expectations and prepares the client for the initial client meeting.

Engagement Letter

This engagement letter establishes your working relationship with the client. It allows you to customize your legal maintenance plan options, billing structures, retainer and deposit requirements, and closed file policies.

New Business: Client Letter

This client letter informs your client of various documents you have prepared to form a new company. It discusses next steps for the client to take and sets the stage for a productive and profitable ongoing relationship between your firm and the new company as the company continues to grow and mature.

New Business: Client Memo

This client memo addresses important steps to take once the business is formed. It allows you to provide targeted, client-specific advice about how to operate a new business. It is designed to be presented to clients at the time that the business is formed.

New Business: CPA Letter

This letter informs the CPA of a mutual client's decision to form a new business, ensuring that the CPA will be involved in establishing the business records.

Employee Benefits: Client Letter

This client letter forwards the Employee Benefits Worksheet to the client with instructions.

Employee Benefits: Worksheet

The Employee Benefits Worksheet guides your client through the process of determining benefits for their employees. It also documents the decisions that were made to help you update their annual minutes and other company records to keep their books consistent.

Insurance Coverage: Client Letter

This client letter forwards the Insurance Coverage Worksheet to the client with instructions.

Insurance Coverage: Worksheet

The Insurance Coverage Worksheet helps the client evaluate the adequacy of insurance coverage.

Estate Planning: Client Letter

This client letter forwards the Estate Planning Worksheet to the client with instructions.

Estate Planning: Worksheet

The Estate Planning Worksheet helps gather information about the personal estate planning needs of business

Future Client Planning

The Future Client Planning templates include letters and worksheets for communicating with your clients and their professional advisors regarding annual legal audits, midyear and year-end tax planning, and other tax return preparation matters.

Annual Legal Audit: Client Letter

This client letter helps your client and other advisors understand what you're looking for in the annual legal audit process. It alerts them to the kinds of issues that will require additional planning to allow the client to stay on top of their personal and business planning.

Annual Legal Audit: Client Worksheet

This worksheet helps you systematically work through the client's business file to determine what needs the greatest attention in the periodic review.

Halfway to Tax Day: Client Letter

This client letter forwards the Half Way to Tax Day Worksheet to the client with instructions.

Halfway to Tax Day: Worksheet

The Halfway to Tax Day Worksheet helps you, your client, and their other advisors stay on top of significant tax and financial decisions that impact the company's tax position each year.

Halfway to Tax Day: CPA Letter

This letter is directed to the CPA to advise that the Half Way to Tax Day Worksheet has been sent to the client so all members of the client's planning team stay on top of significant tax and financial decisions that impact the company's tax position each year.

Year-End Planning: Client Letter

This client letter forwards the Year-End Planning Worksheet to the client with instructions.

Year-End Planning: Worksheet

The Year-End Planning Worksheet helps the client think through and identify planning items at the end of the year. It provides a central tool to help the client gather information they will need as the tax season nears.

Year-End Planning: CPA Letter

This letter is directed to the CPA to advise that the Year-End Worksheet has been sent to the client so that you can work together to coordinate the business's year-end planning.

Tax Time: Client Letter

This client letter forwards the Tax Time Worksheet to the client with instructions.

Tax Time: Worksheet

The Tax Time Worksheet helps your clients track down important tax documents, compensation plans, and other

Legal Maintenance Plan

The Legal Maintenance Plan folder includes the Legal Maintenance Plan and other communications needed to administer a subscription-based business model for client services.

Engagement Letter

This engagement letter establishes your working relationship with the client. It allows you to customize your legal maintenance plan options, billing structures, retainer and deposit requirements, and closed file policies.

Legal Maintenance Plan

The Legal Maintenance Plan provides you with a subscription-based model for providing ongoing legal services. The Legal Maintenance Plan is assembled as part of the Engagement Letter assembly and is included here for reference only.

Welcome Letter

This is a welcome letter for new clients that retain your firm to provide periodic review of their business records. It sets the stage and clarifies expectations for the maintenance program and process.

Announcement Letter

This client letter is designed to introduce your existing clients to your new Legal Maintenance Plan. It helps your client understand the importance of keeping their business records and documents current, and it defines the role your firm will serve in making sure that happens.

Additional Information Letter

This client letter can be used in response to a request for more information about your Legal Maintenance Plan.

Seminar Invitation Letter

This client letter invites potential clients to a free seminar to market your Legal Maintenance Plan.

Follow-Up Letter

This client letter can be used to follow-up on a Legal Maintenance Plan lead. It includes a limited-time discounted offer.

Renewal Letter

This client letter is designed to be sent annually to your business clients, helping them to better understand the value that your maintenance program provides to them and their business. The letter also contains an annual maintenance program invoice to expedite your billing cycle for business maintenance renewals.

Termination Letter

This termination letter notifies the client that the maintenance relationship is over, while keeping the door open for legal engagement in the future if the need arises.



Formation and Startup Suite

The Formation and Startup Suite provides you with the documents you need to form new business entities for your clients. It includes the formation and operational documents for general partnerships, limited partnerships, for-profit corporations, non-profit corporations, and limited liability companies. It also includes attorney guides and resources to help inform the choice-of-entity decision and facilitate filing of the formation documents with the appropriate state agency.

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LLC Formation Suite

The LLC Formation Suite includes the documents you need to form a limited liability company and structure the relationship between the founders. It includes the following documents:

Operating Agreement & Ancillaries

The Operating Agreement is the primary document for governing the affairs of a limited liability company. It includes a wide range of options, including the ability to choose between member-managed, manager-managed, and board-managed structures; classify the organization for tax purposes as a partnership, C corporation, S corporation, or disregarded entity; and create different classes of equity based on differences in voting or economic rights. Users may select between Full, Streamlined, and Simplified versions of the Operating Agreement, depending on the needs of the client.

Self-Directed IRA LLC Operating Agreement

This “Self-Directed IRA LLC Operating Agreement” should be used when a client is seeking to create a “IRA/LLC” or “checkbook control IRA” arrangement by which the client may directly manage his or her IRA investments through an LLC owned 100% by a self-directed IRA.

LLC Formation Checklist

This checklist is designed to be stapled in the inside cover of your file, or kept online for easy access, to ensure that all required steps in setting up your clients’ businesses are complete, and to give you a quick snapshot of the status of the file as it moves through the formation process.

LLC Formation Document

The LLC Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form the LLC. Depending on the state of formation, the formation document may be referred to as the Articles of Organization, Certificate of Formation, Certificate of Organization, or Organizer’s Statement. This document, which closely parallels articles of incorporation needed for legal formation and recognition of corporations, is required to be filed with an appropriate state or local government agency in order to establish legal recognition of an LLC.

Operating Agreement: Executive Summary

The Executive Summary is a synopsis of the key provisions of the Operating Agreement. The Executive Summary is created dynamically based on the answers given in the Operating Agreement interview.

Schedule of Members

The Member Schedule provides a list of the current members of a limited liability company.

Organizer Action

This Organizer Action is executed by the LLC’s creator(s) to relinquish the role of organizer and facilitate the transfer of management authority to the appropriate LLC parties.

Meetings, Minutes, and Resolutions

This document can be used for Minutes & Resolutions resulting from a meeting, or to create an Action Taken Without Meeting.

Appointment of Registered Agent

The Appointment of Registered Agent provides for the appointment and consent of a registered agent to receive service of process on behalf of the company.

Subscription Agreement

The Subscription Agreement contains acknowledgments and disclosures specific to the acquisition of a membership interest by a new member and evidences the member’s agreement to be bound by the terms of the Operating Agreement.

Membership Certificate

Membership Certificates can be used to evidence a member’s equity interest in a limited liability company.

LLC Playbook

The LLC Playbook is an overview of the key aspects of maintaining an LLC, meant for inclusion in clients’ binder.

LLC Portfolio Inserts

Portfolio Inserts can be used to divide the various LLC documents, meant for inclusion in clients’ binder.

Transfer Ledger

Use this Transfer Ledger to document transfers of ownership interests in the entity.

Amendment to Operating Agreement

The Amendment to Operating Agreement can be used to make minor amendments to the Operating Agreement in situations where the changes are not so extensive as to require a full amendment and restatement of the Operating Agreement.

IRS Forms

IRS forms SS-4 (application for employer identification number); 8832 (entity classification election); 2553 (election by a small business corporation); 2848 (power of attorney and declaration of representative).

Corporate Formation Suite

The Corporate Formation Suite includes the documents you need to form a business or nonprofit corporation and structure the relationship between the founders.

Corporate Formation Checklist

This checklist is designed to be stapled in the inside cover of your file, or kept online for easy access, to ensure that all required steps in setting up your clients' businesses are complete, and to give you a quick snapshot of the status of the file as it moves through the formation process.

For Profit Corporate Formation Document (Articles of Incorporation)

The For Profit Corporate Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form a corporation. Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Agreement to Form Corporation

The Agreement to Form Corporation memorializes the understanding of parties to form a new corporation before the corporate filing actually takes place. The Agreement to Form can also strengthen the corporate veil by clearly expressing the intent among the shareholders to form a well-designed company.

Bylaws

The Bylaws are the primary document for governing the affairs of a corporation.

Action by Incorporator

This Action by Incorporator is executed by the corporation's creator(s) to relinquish the role of organizer and facilitate the transfer of management authority to the appropriate corporation parties.

Subscription Agreement

The Subscription Agreement is a written agreement to purchase a specified number of shares in a company at a later date. The Subscription constitutes a legal obligation to contribute capital in exchange for equity, with subscribed stock credited to the subscriber as capital is contributed to the company. This subscription agreement is intended for use with private offerings of stock to an individual subscriber.

Stock Certificate

Stock Certificates can be used to evidence a shareholder's equity interest in a corporation.

Transfer Ledger

Use this Transfer Ledger to document transfers of ownership interests in the entity.

Voting Trust Agreement

The Voting Trust is used to aggregate and protect the voting interests of shareholders in a company. This structure might also be used to create a "blind" trust to mitigate potential conflicts of interest among the shareholders. The trustee of the Voting Trust exercises the voting powers of the shareholders according to the powers provided in the trust agreement.

Voting Trust Certificate

The Voting Trust Certificate evidences the transfer of stock from the shareholders into a Voting Trust.

Shareholder Schedule

The Shareholder Schedule provides a list of the current shareholders of a corporation and their contributions.

Shareholder Contributions Exhibit

The Shareholder Contributions Exhibit provides a list of the shareholders contributions to the corporation.

Corporate Portfolio Inserts

Portfolio Inserts can be used to divide the various corporate documents, meant for inclusion in clients' binder.

General Partnership Suite

The General Partnership Suite includes the documents you need to form a general partnership and structure the relationship between the founders.

Partnership Formation Document (Certificate of Partnership)

The Partnership Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form the partnership (if such filing is required). Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

General Partnership Agreement

The General Partnership Agreement is the primary document for governing the affairs of a partnership.

Partner Contributions Exhibit

The Partner Contributions Exhibit provides a list of the current partners of a partnership and their initial contributions.

Partner Contributions - Schedules

The Partner Contributions Schedules provides a list of the current partners of a partnership and their initial contributions.

General Partner Certificate of Interest

Partner Certificates can be used to evidence a partner's equity interest in a partnership.

Amendment to General Partnership Agreement

The Amendment to Partnership Agreement can be used to make minor amendments to the Partnership Agreement in situations where the changes are not so extensive as to require a full amendment and restatement of the Partnership Agreement.

Dissolution of General Partnership Agreement

The Dissolution of General Partnership Agreement can be used to dissolve a partnership.

Limited Partnership Suite

The Limited Partnership Suite includes the documents you need to form a limited partnership and structure the relationship between the founders.

Partnership Formation Document (Certificate of Limited Partnership)

The Partnership Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form the partnership (if such a filing is required). Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Limited Partnership Agreement

The Partnership Agreement is the primary document for governing the affairs of a partnership.

Partner Contributions Exhibit

The Partner Contributions Exhibit provides a list of the current partners of a partnership and their initial contributions.

Partner Contributions - Schedules

The Partner Contributions Schedules provides a list of the current partners of a partnership and their initial contributions.

Subscription Agreement

The Subscription Agreement contains acknowledgments and disclosures specific to the acquisition of a partnership interest by a new partner and evidences the partner's agreement to be bound by the terms of the Partnership Agreement.

General Partner Certificate of Interest

Partner Certificates can be used to evidence a partner's equity interest in a partnership.

Limited Partner Certificate of Interest

Partner Certificates can be used to evidence a partner's equity interest in a partnership.

Amendment to Limited Partnership Agreement

The Amendment to Partnership Agreement can be used to make minor amendments to the Partnership Agreement in situations where the changes are not so extensive as to require a full amendment and restatement of the Partnership Agreement.

Non-Profit Formation Suite

The Corporate Formation Suite includes the documents you need to form a business or nonprofit corporation and structure the relationship between the founders.

Non-Profit Corporate Formation Document

The Corporate Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form a corporation. Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Bylaws

The Bylaws are the primary document for governing the affairs of a corporation.

Buy-Sell Agreement

The Corporate Formation Suite includes the documents you need to form a business or nonprofit corporation and structure the relationship between the founders.

Non-Profit Corporate Formation Document

The Corporate Formation Document is a generic form to file with the appropriate state or local governmental agency in order to legally form a corporation. Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Bylaws

The Bylaws are the primary document for governing the affairs of a corporation.

Conversion Suite

The Entity Conversion Suite includes templates for converting an entity from one type to another, for example, from an S-Corporation to an LLC. The suite includes correspondence, planning documents, minutes, and a conversion tax return statement.

Client Letter: Conversion Fee Proposal

This client letter helps your clients understand the scope of the services you'll render to them during a statutory conversion process. It also helps your office keep track of what steps are necessary to complete the conversion process. The letter is set up to contemplate a "time estimate factor" that you might then apply against your hourly rate. You can also use that time estimate factor to set your fixed fee for the conversion service, demonstrating to your client the scope of the value you're providing with the service.

Model Certificate of Conversion

The Model Certificate of Conversion may be used in those few jurisdictions that do not have a statutory form conversion document. Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Plan of Reorganization

The Plan of Reorganization is a model document for the Agreement and Plan of Reorganization under Section 368(a)(1)(F) of the Internal Revenue Code. It is part of the corporate records to establish evidence that the company has complied with the Code and Regulations to avoid a taxable reorganization.

Minutes of Special Meeting (Reorganization)

The Minutes of Special Meeting (Reorganization) memorialize the joint decisions made by the shareholders and the directors of a corporation as they move to convert a statutory C corporation or S corporation to an LLC. These minutes also outline the actions the company will take through the conversion process to help ensure that the formalities of conversion are properly followed.

Conversion Tax Statement

The Conversion Tax Return Statement should be attached to the client's form 1120 or 1120S to provide background supporting information and documentation for a statutory conversion from a corporation to a limited liability company.



Business Maintenance Suite

The Business Maintenance Suite includes a Meetings, Minutes, and Resolutions subfolder with all of the documents needed to conduct and document business meetings.

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Meetings and Voting

The Meetings and Voting templates include documents for conducting company meetings, documenting business decisions, and ratifying company actions. These documents can be used for corporations, partnerships, and limited liability companies.

Business Maintenance Questionnaire

Use this questionnaire to collect information related to your clients' businesses in preparation for their annual meeting and other annual documentation.

Minutes and Resolutions

This document can be used for Minutes & Resolutions resulting from a meeting, or to create an Action Taken Without Meeting.

Action by Organizer/Incorporator

This Action by Organizer/Incorporator is executed by the LLC/corporation's creator(s) to relinquish the role of organizer and facilitate the transfer of management authority to the appropriate LLC/corporation parties.

Secretary's Certificate

The Secretary's Certificate allows the secretary or other appropriate party to certify the formation document, governing document, authorizing resolution, incumbency of officers, and schedule of owners of a company.

Meeting Agenda

The Meeting Agenda allows the user to generate a custom agenda for a regular or special meeting of the owners or managing body of a company. The answers given in the Meeting Agenda interview can be saved to the answer file to allow quick generation of a corresponding set of Minutes to document the actions discussed at the meeting.

Notice of Meeting

The Notice of Meeting is provided to owners or managers of a company to formally notify them of an upcoming regular or special meeting. These notices are often required by the company's organizational documents.

Client Letter: Notice of Meeting

The Client Letter – Notice of Meeting is a succinct cover letter for use in forwarding a Notice of Meeting to the owners or managers of a company. It includes options for attendance by telephone or videoconference and for voting by proxy.

Voting Proxy

A Voting Proxy allows an individual owner of a company to designate another party to vote on their behalf at a duly-called meeting. The Business Docx Voting Proxy allows the owner to give a general proxy that is valid for all actions or a specific proxy for a specific action. attorney and declaration of representative).

Changes to Entity

The Changes to Entity templates include model documents for reorganizing or converting an existing business entity. Also included are a client letter, special meeting minutes memorializing a plan of reorganization, and a tax return statement providing supporting information for your client's tax forms.

Client Letter: Conversion Fee Proposal

This client letter helps your clients understand the scope of the services you'll render to them during a statutory conversion process. It also helps your office keep track of what steps are necessary to complete the conversion process. The letter is set up to contemplate a "time estimate factor" that you might then apply against your hourly rate. You can also use that time estimate factor to set your fixed fee for the conversion service, demonstrating to your client the scope of the value you're providing with the service.

Model Certificate of Conversion

The Model Certificate of Conversion may be used in those few jurisdictions that do not have a statutory form conversion document. Users are encouraged to use the forms provided by the appropriate agency in the state of formation if those forms adequately address their needs.

Plan of Reorganization

The Plan of Reorganization is a model document for the Agreement and Plan of Reorganization under Section 368(a)(1)(F) of the Internal Revenue Code. It is part of the corporate records to establish evidence that the company has complied with the Code and Regulations to avoid a taxable reorganization.

Minutes of Special Meeting (Reorganization)

The Minutes of Special Meeting (Reorganization) memorialize the joint decisions made by the shareholders and the directors of a corporation as they move to convert a statutory C corporation or S corporation to an LLC. These minutes also outline the actions the company will take through the conversion process to help ensure that the formalities of conversion are properly followed.

Conversion Tax Statement

The Conversion Tax Return Statement should be attached to the client's form 1120 or 1120S to provide background supporting information and documentation for a statutory conversion from a corporation to a limited liability company.

Shareholders and Members

Upcoming additions to the Shareholders and Members templates will include a Spousal Consent, Shareholder Agreement, Redemption Agreement, and Assignment of Equity Agreement.

Transmutation Agreement

The Transmutation Agreement changes the character of property from community property to separate property or vice versa. Transmutation is an important component to various planning strategies in the following community property states: Washington, Idaho, California, Nevada, Arizona, New Mexico, Texas, Louisiana, and Wisconsin. (Alaska is a separate property state but allows couples to opt in to community property treatment.)

Officers, Directors, and Managers

The Officers, Directors, and Managers templates include documents for actions and operations needed by the officers, directors or managers of corporations and LLCs.

Resignation of Officer, Director or Manager

The Resignation of Officer, Director or Manager can be used for corporations, LLCs or partnerships.



General Operations Suite

The General Operations Suite provides you with the documents you need to handle ongoing operational matters for your business clients. In addition to a variety of general-purpose documents, it includes a Meetings, Minutes, and Resolutions subfolder with all of the documents needed to conduct and document business meetings and an Employees and Contractors subfolder with the documents needed to structure relationships with service providers.

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Business Management

The Business Management templates include a Nondisclosure, Noncompetition, and Nonsolicitation Agreement; an Equipment Lease Agreement; and a simplified Commercial Lease.

Nondisclosure, Noncompetition, and Nonsolicitation Agreement

The Nondisclosure, Noncompetition, and Nonsolicitation Agreement prohibits those who receive confidential information from disclosing it and competing against your client and restricts when they can solicit customers, vendors, and employees. This template allows you to customize the agreement to your client's individual situation without requiring inclusion of all three restrictive covenants.

Equipment Lease Agreement

The Equipment Lease allows your business clients to pay reasonable business expenses into another entity that owns equipment used in the ongoing operations of the business. This is often seen in dental or medical practices, or in manufacturing and farming where highly valued, depreciating assets are used on an ongoing basis.

Simplified Commercial Lease (Real Estate)

The Simplified Commercial Lease provides a simple document for structuring a lease of commercial real estate. You may structure the lease as a triple net lease, gross/full service lease, or customize the terms.

Vendors and Suppliers

The Vendors and Suppliers templates include an Independent Contractor Agreement. Upcoming additions will include a Distributor Agreement and Joint Venture Management Agreement.

Independent Contractor Agreement

The Independent Contractor Agreement is used to structure business arrangements with service providers that will not be considered employees of the hiring company. It can also be used to structure relationships with consultants, including consulting agreements used in connection with business acquisitions.

Marketing and Customers

The Marketing and Customers templates include a Consent to Use Testimonial (for testimonials used for promotional purposes), and a Liability Waiver (for participation in an event or activity). Upcoming additions will include a Consent to Use Photo or Likeness.

Consent to Use Testimonial

The Consent to Use Testimonial is intended for clients who solicit testimonials from their customers to promote websites, videos, products, or other marketing efforts.

Liability Waiver (Participation in Event/Activity)

A Liability Waiver & Release related to an activity or event.

Privacy Policy Suite

The privacy policy suite was designed to create consumer-facing legal policies and notices for your clients' websites and mobile applications. This suite includes a privacy policy, a cookie policy, and terms and conditions.

Privacy Policy

The Privacy Policy allows you to select a variety of options for information that could be gathered by your clients' online offerings and activities, including websites, apps, email, text messaging, and other forms of electronic messaging. Likewise, additional options are available to address the type of personal information that might be gathered, privacy settings when accounts are created, and the use of targeted advertising.

Cookie Policy

The Cookie Policy can help your clients ensure that they are providing transparent communications about the methods used to collect information on their sites.

Terms and Conditions

The Terms and Conditions allows you to select whether to include or exclude information from the document depending on your client's unique business, the age of your client's online users, the type of communication allowed through the client's site, and other unique operational needs.

Demand Letters

The Demand Letters templates include a Payment Demand Letter (for collection of your client's commercial receivables). Upcoming additions will include a Notice of Breach of Contract letter and Cease and Desist letter.

Payment Demand Letter (Commercial Accounts)

Payment Demand Letter for the collection of Clients' outstanding commercial accounts. This document should NOT be used for the collection of any consumer accounts or any attempt to collect from individuals.



Employees and Contractors Suite

The Employees and Contractors Suite includes the documents you need to structure relationships between a business and its service providers.

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Employee and Contractor Agreements

The Employee and Contractor Agreements templates include an Employment Agreement, an Independent Contractor Agreement, and an Arbitration Agreement. Upcoming additions will include a Severance Agreement and other key employee documents.

Independent Contractor Agreement

The Independent Contractor Agreement is used to structure business arrangements with service providers that will not be considered employees of the hiring company. It can also be used to structure relationships with consultants, including consulting agreements used in connection with business acquisitions.

Arbitration Agreement (Mutual Agreement to Arbitrate)

The Arbitration Agreement is an agreement to settle disputes through arbitration.

Employment Agreement

The Employment Agreement is used to structure business arrangements with service providers that will be considered employees of the hiring company.

Policies and Procedures

The Policies and Procedures templates include an extensive Employee Handbook, and an Employee Performance Review and associated planning worksheet.

Employee Handbook

The Employee Handbook provides a generic template for use in governing the employment relationship.

Employee Performance (Review and Planning Form)

The Performance Review and Planning Form provides a worksheet for documenting an employee's performance review.

Compensation Agreements

The Compensation Agreements templates include a Deferred Compensation Agreement (providing a nonqualified deferred compensation plan for highly compensated employees) and a Stay Bonus Agreement (to incentivize upper-level employees to remain after an owner's death).

Deferred Compensation Agreement

The Deferred Compensation Agreement provides a non-qualified deferred compensation plan for the benefit of highly-compensated employees or executives.

Stay Bonus

The Stay Bonus Agreement provides management or upper-level employees with an incentive to remain with a business after an owner's death.



Mergers, Acquisitions, and Buyouts Suite

The Mergers, Acquisitions, and Buyouts Suite contains the documents you need to handle exit planning and business sales for your clients. It includes a Buy-Sell Agreement to plan for the death, disability, or retirement of business owners; an Equity Purchase Agreement to handle stock and other equity sales; and an Asset Purchase Agreement for use in the asset purchase context. It also includes various ancillary documents to facilitate mergers, acquisitions, and other business exits.

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Buy-Sell Agreement Suite

The Buy-Sell Agreement Suite includes the Buy-Sell Design Worksheet, the Buy-Sell Agreement and Executive Summary.

Buy-Sell Design Worksheet

Use this client homework to both collect information from your clients to use in designing a buy-sell agreement and to introduce your clients to some of the issues and concepts that will be covered by the buy-sell.

Buy-Sell Agreement

The Buy-Sell Agreement provides for the exit of one or more owners due to death, disability, retirement, or termination of employment. It also contains options for resolving corporate deadlock and related matters. It can be used for corporations, partnerships, and limited liability companies.

Buy-Sell Agreement: Executive Summary

The Executive Summary is a synopsis of the key provisions of the Buy-Sell Agreement. The Executive Summary is created dynamically based on the answers given in the Buy-Sell Agreement interview.

Equity Purchase Agreement Suite

The Equity Purchase Agreement Suite includes the documents you need to structure a business acquisition as a purchase or sale of equity. It can be used for corporations, partnerships, and limited liability companies.

Letter of Intent - Equity Purchase

Business acquisitions begin with a letter of intent between the parties. The Letter of Intent highlights big-picture items that will be further defined in the various agreements and other documents to memorialize the transaction.

Equity Purchase Agreement

The Equity Purchase Agreement is used to structure a business acquisition as an equity transfer. It applies to transfers of stock (if the business is a corporation), partnership interests (if the business is a partnership), or membership interests (if the business is a limited liability company).

Spousal Consent

If your client is married it is a best practice – and mandatory in some jurisdictions – to document their spouse's consent to a business acquisition. Failure to document spousal consent may result in lengthy litigation if the transaction doesn't live up to the buyer's – or their spouse's – expectations.

Opinion Letter of Buyer

The Opinion of Buyer's Counsel is provided for the benefit of the seller to reassure the seller that the buyer is in good legal standing and has the authority to consummate the business acquisition.

Opinion Letter of Seller

The Opinion of Seller's Counsel is provided by seller's attorney for the benefit of the buyer to reassure the buyer that the seller is in good legal standing and has the authority to consummate the sale of the business.

Pledge Agreement

Like the security agreement for an asset purchase, the pledge agreement, or equity pledge agreement, is often coupled with an equity purchase agreement. If the buyer borrows money from a third party lender, that lender will seek a security interest backed by the equity of the company. Again, like the security agreement for an asset purchase, the pledge agreement can be particularly helpful in documenting arms-length transactions when a buyer borrows money from a trust or other wealth preservation tool to acquire equity in another company.

Closing Certificate

The Closing Certificate is signed at closing to represent that the representations and warranties made in the purchase agreement are still valid on the closing date.

Asset Purchase Agreement Suite

The Asset Purchase Agreement Suite includes the documents you need to structure a business acquisition as a purchase or sale of assets. It can be used for corporations, partnerships, and limited liability companies.

Letter of Intent - Asset Purchase

Business acquisitions begin with a letter of intent between the parties. The Letter of Intent highlights big-picture items that will be further defined in the various agreements and other documents to memorialize the transaction.

Asset Purchase Agreement

The Asset Purchase Agreement is used to structure a business acquisition as an asset transfer.

Noncompetition, Nonsolicitation, and Nondisclosure Agreement

When a business acquisition is complete, the last thing the buyer wants is for the seller to open up shop across the street and go into competition with the buyer. The noncompetition, nondisclosure, and nonsolicitation agreement helps you protect the buyer's interests by memorializing an agreement that the seller will not go into competition with the buyer, will not disclose material information about the transaction, and will not solicit employees or vendors away from the buyer to a new enterprise the seller pursues.

Opinion Letter of Buyer

The Opinion of Buyer's Counsel is provided for the benefit of the seller to reassure the seller that the buyer is in good legal standing and has the authority to consummate the business acquisition.

Opinion Letter of Seller

The Opinion of Seller's Counsel is provided by seller's attorney for the benefit of the buyer to reassure the buyer that the seller is in good legal standing and has the authority to consummate the sale of the business.

Security Agreement

The Security Agreement is used in the acquisition to secure the buyer's payment of the purchase price. It should be used in conjunction with a promissory note.

Closing Certificate

The Closing Certificate is signed at closing to represent that the representations and warranties made in the purchase agreement are still valid on the closing date.

Additional Resources

Legal Due Diligence Checklist

The Legal Due Diligence Checklist helps you spot issues and assist your client in gathering the information needed to make informed decisions in connection with a business acquisition.

Secured Promissory Note

The Secured Promissory Note is used to evidence a borrower's secured obligation to pay a lender.

Assignment and Transfer of Interest

The Assignment and Transfer of Interest transfers equity in partnerships and limited liability companies to new owners. There are several options for structuring the document, including the ability to require consent by non-assigning owners and the ability to include language stating that the interest has not been registered under Federal or state securities laws.

Bill of Sale and Assignment

The Bill of Sale and Assignment accompanies a sale/purchase transaction to demonstrate clear transfer of interests from the seller to the buyer.

Dissolution of General Partnership Agreement

The Dissolution of General Partnership Agreement can be used to dissolve a partnership.

Entity Conversion Suite

(See "Conversion Suite" descriptions above)

For more information on Business Docx and a membership in WealthCounsel:
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