

LEGAL CONFIDENCE CHECKLIST



ATHENA LEGAL SOLUTIONS
Approachable. Knowledgeable. Trusted.

How Protected Is Your Business, Really?

Every business owner has blind spots—and legal gaps are some of the costliest.

This quick, self-guided audit helps you evaluate your confidence in five essential areas where legal risks hide:

Entity & Corporate Governance, Sales & Customers, Brand & Intellectual Property, Marketing & Online Activities, and Planning & Protection.

For each question, rate your confidence from 1 to 5:

1 = Not at all confident

5 = Totally confident and protected

You don't need to be a lawyer to do this. Just trust your gut—and be honest. Use your results to spot where you're strong... and where you might need a little legal backup.

Tip: If you score a 1–2 in any section, that's a signal to explore it deeper—or book a Profits Protected™ session to address it head-on.

Let's protect what you've built—and make room for more.

Entity & Corporate Governance

Your business structure isn't just paperwork—it's your legal backbone.

Sales & Customers

Healthy sales start with strong boundaries.

Brand & Intellectual Property

Your ideas, content, and identity are assets worth protecting.

Marketing & Online Activities

If it lives online, it lives under legal scrutiny.

Planning & Protection

Being proactive is the ultimate business advantage.





Entity & Corporate Governance

Your brand is your business. From your name to your content—make sure it's protected and that you own what you've built.

Are your attorney and accountant aligned on your business entity (LLC, S-Corp, etc.) and tax status are appropriate for you?

1 2 3 4 5

Do you have an operating agreement or articles/bylaws in place—and are they up to date?

1 2 3 4 5

Are you documenting major decisions properly (e.g., partnership changes, ownership transfers, share/unit issuances, etc.)?

1 2 3 4 5



Sales & Customers

Every dollar you earn is tied to a relationship. Without the right agreements in place, payment disputes and scope creep can erode your profits and peace of mind.

Do you use a consistent contract for all your customers or clients?

1 2 3 4 5

Are your payment terms, deliverables, and refund policies clearly spelled out in writing?

1 2 3 4 5

Have you updated your customer agreements within the last 12 months?

1 2 3 4 5



Brand & Intellectual Property

Your brand is your business. From your name to your content—make sure it's protected and that you own what you've built.

Have you trademarked your business name, logo, or key product names?

1 2 3 4 5

Do you clearly own all content created for your brand whether by an employee or contractor (e.g., photos, copy, designs, website, etc.)?

1 2 3 4 5

Are your IP rights covered in contracts with contractors or collaborators?

1 2 3 4 5



Website & Online Activities

If you're collecting emails, making offers, using AI or sharing content online—there are legal requirements you can't afford to ignore.

Does your website have a Privacy Policy and Terms & Conditions posted?



Are you complying with email marketing laws (like CAN-SPAM or GDPR)?



Are you protecting your social media content?



Do you understand if your contractors and/or employees are using AI?



Planning & Protection

You didn't start your business to leave it unprotected. Whether it's an emergency or a long-term exit, you need a plan.

If you stepped away for 30 days, would your business run smoothly without you?



Do you have a succession or emergency plan documented where someone can find it?



Is your business covered in your personal estate plan or trust?



About Us

At Athena Legal Solutions, we believe legal support should feel like strategy — not stress.

Founded by attorney Carolyn Jahnke, Athena was created to give entrepreneurs, small business owners, and vision-driven leaders the tools to confidently protect what they've built, grow with clarity, and harvest lasting value.

We know that most business owners don't avoid legal because they don't care — they avoid it because it feels confusing, expensive, or overwhelming.

That's why we've reimagined legal as approachable, actionable, and aligned with your goals.

No shame. No lectures. Just clarity, calm, and custom support that actually moves your business forward.