

“Get it in Writing”

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“Get it in Writing” makes good sense when we are dealing with human beings. Why? Just read on.

Human beings often have lapses in memory. Some such lapses are genuine. Others are contrived. Regardless, if you intend to rely upon what you have been told and invest your time, talent, money, reputation, etc. on same, it is wise to have the information or agreement memorialized in written form then signed and dated by the parties involved. This will serve you well in the future should a dispute arise as to exactly what was agreed upon.

Getting it in writing smoothes out all manner of situations because the parties are on the record and have no wiggle room in an attempt to recast the situation later on. Some of these everyday situations include:

1. Disputes with creditors, service providers and so forth;
2. Misunderstandings with persons in authority at the school your children attend;
3. Disagreements among partners or members of an investment group; and
4. Policy matters discussed with an employer.

In fact, when you make a habit of documenting the pronouncements of others with whom you expect to have ongoing interaction, you will become generally known as such an individual. Thereafter you will find that fewer and fewer folks try to purposely mislead you. When folks are aware that you are recording what they say (text / date / time / place), they generally get right to the point or delay the matter while they seek the comfort of having consulted a higher authority before finalizing the discussion with you.

When you are forced to deal with someone who habitually claims you ‘misunderstood’ the prior instructions when, in fact, it was he who failed to pay close attention to the source on which his information is based, you are well advised to do the following regarding any critical matter:

1. Listen carefully to his instructions and take notes;
2. Question anything needing clarification;
3. Afterward, write up what was agreed upon;
4. At the bottom, say something like “If the above accurately sets forth your understanding of this matter, please evidence this by your signature below and return it to me for my file”; then
5. Sign it and create a space for the recipient’s signature.

Documenting needed situations is a bit time consuming but it is time very well spent if that documentation keeps you out of hot water in the future