
Client Policies and Procedures

Coaching Relationship

This coaching relationship is based on the principle that you are a whole and brilliant person. Stress or other factors may slow you down at times, but you have your best answers. As your coach, I am a partner and consultant for creating your goals and executing strategies to meet those goals. But you are in the driver's seat of this process. (You may be aware that I hold a license as a mental health therapist, but that is not the role I will have in the coaching relationship.)

Sessions

Sessions last up to one hour. You are responsible for: 1) Scheduling your sessions and initiating our calls in the case of phone coaching, 2) calling or arriving on time, 3) and completing any interim journaling or homework between appointments. Sessions are booked on a per-session or package basis as determined by our agreement. In either case, payment is made at the time the individual session or package is scheduled.

Communication

You may call or email between sessions if you need "spot coaching," have a problem, or would like to share a success with me. I enjoy delivering this extra level of service. I do not bill for additional time of this type, but I ask that you please keep the extra calls to 5 or 10 minutes. When you leave a message, let me know if you want a call or message back, and I will respond as soon as I am able.

Changes

Clients give me 24 hours of notice if they need to cancel or reschedule a call. If you have an emergency, we will work around it. Otherwise a call that is missed or cancelled without adequate notice is not made up.

Problems/Needs

I want you to be satisfied with our coaching relationship. Please feel absolutely free to bring up any concerns or questions you may have, as soon as you recognize them. I will do my very best to be as responsive as I am able.

Payment

Coaching fees are pre-paid when a session or package of sessions is scheduled. Payment can be made by check or credit card. In the interest of time and ease, many clients prefer to provide a credit card to be kept on file for payment at the time of scheduling or on a monthly basis.

Client Information:

Name _____

Address _____

Phone Number _____

Email _____

Coaching Format: ____ Per session (*\$110/session*) ____ Monthly Package (*up to 4 sessions for \$360/month*)

First Session Date and time: _____

Referred by: _____



Coaching Agreement

1. I understand that the “coaching” relationship is designed to facilitate the creation/development of personal, professional or business goals, and to learn tools for achieving those goals.
2. I understand that life coaching is for people who are already successful, safe and emotional healthy. I understand and agree that I am fully responsible for my physical, mental and emotional wellbeing during coaching process.
3. I understand that coaching is intended for individuals who want to take action and make behavior changes in the service of their goals for life, health, wellbeing or work. I understand that coaching does not involve the diagnosis or treatment of physical or mental disorders. I certify that I am not using coaching as a substitute for assistance from a mental health professional or medical doctor. I will not use coaching in place of any other medically necessary therapy or treatment such as psychotherapy or substance abuse treatment.
4. I agree that if I am currently seeking treatment from a psychotherapist or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a coach and that this person is aware of my decision to proceed in this coaching relationship.
5. I agree and understand my coach or I can terminate or discontinue coaching at any time. If I need to cancel or change the time of a coaching appointment I understand I must provide 24 hours notice.
6. I understand that confidentiality in the coaching relationship is limited. Confidentiality will not apply to certain crimes that have been or are planning to be committed. It is also possible that topics discussed could be anonymously reviewed with other coaching professionals for training and development purposes. If I terminate my coaching, any assignment work or information about our coaching sessions will be deleted from my coach's files after one year. I also agree that I consent to using e-mails to sometimes transmit sensitive information. I acknowledge the risks involved and waive any rights against my coach for errors made in these transmissions.
7. I understand that the methodology, coaching techniques and strategies used, as well as assignments, documents or emails are proprietary. I agree that they may not be used for any other purposes other than my own coaching experience without written consent from my coach.
8. All sessions are scheduled for one hour. I agree to pay the agreed upon coaching fee of \$_____ per scheduled session, or \$_____ per month for up to 4 sessions in a calendar month. I understand that payment is due at the time I schedule a session or package of sessions. I also understand that if I miss or cancel a scheduled session without 24 hours notice, I forfeit that time and it will not be made up.

I understand that I have the option of providing credit card information below to facilitate ease of payment for sessions. By entering the card information and signing below, I provide my authorization to charge this card.

Type of Card: _____ (Visa, MasterCard etc.)
Name of Cardholder: _____
Card number: _____
Expiration Date: _____ Security code on back: _____ Billing Zip Code _____

**I authorize the above credit card to be charged for coaching fees as outlined in this agreement.

Client Signature: _____



9. I understand that life coaching is not to be used in lieu of professional medical advice, legal counsel, financial advice, business consultation or spiritual guidance. I will seek appropriate professional guidance for legal, medical, financial, business, spiritual or other matters. I acknowledge that I will not use coaching as a substitute for professional guidance. I further acknowledge that my decisions and actions in the above mentioned areas are my responsibility.

10. I agree to be open with feedback on my experience of the coaching process and notify my coach of any concerns as soon as they may arise.

11. Total liability under this coaching agreement shall be limited to the total amount actually paid by a client to the coach. In no event shall the coach be liable for any consequential or indirect damages alleged to result from the coach's performance or obligations under this agreement. I understand, acknowledge and agree that limited liability is a fundamental part of this agreement.

I have read and agree to all of the above.

Client Signature: _____ **Date:** _____