

## Coaching Agreement

*Welcome! I am delighted to be your coach and look forward to coaching you toward creating the life you really want to have. Please familiarize yourself with this information and know that if you have questions regarding these guidelines we can discuss them further.*

**Client name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Tele #:** \_\_\_\_\_

**Email address:** \_\_\_\_\_

**Commitment:** You are hiring me as your coach because you want to make significant changes. These changes will sometimes happen fast and other times not. Because things happen over time, I request a \_\_\_\_\_ commitment to the coaching process. This will allow the coaching relationship to develop and be a powerful force in your life. Upon completion of the \_\_\_\_\_, coaching will convert to a month-to-month agreement. When it is time to end the coaching relationship, I request a two-week (14 days) notice to allow us time to process the closure.

**Fees:** My monthly individual coaching fee is \$\_\_\_\_\_ a month with a \_\_\_\_\_ commitment. Your payment needs to be received by the 1<sup>st</sup> of each month, please mail to \_\_\_\_\_.

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*(auto-deduction and credit card payments are also available)* Please make prior arrangements if you need to be late or if some other day of the month works better in your bookkeeping cycle.

**Services provided:** The jointly scheduled coaching sessions will take place via \_\_\_\_\_. (telephone or other agreed on communication platform)

**Procedure:** Call (if arrange via tele) me at \_\_\_\_\_ at your scheduled appointment time. Please call as close to your exact appointment time as possible.

1. If you are not able to call at the scheduled appointment time, PLEASE call anytime, day or night, and leave a message that you will not be making the scheduled time.
2. If you are not able to call at the scheduled appointment time, leave a message that includes two or three other good times to reschedule.
3. It is your responsibility to reschedule any appointments you have missed. If you call at your scheduled time and immediately get my voice-mail message that means I am on the line, probably running late with a previous appointment. If you encounter this, please DO NOT leave a message. Instead, just call back in about 3-4 minutes.
4. If you get the voice mail on this second attempt to call me (my sincere apologies!!), then please leave a voice mail message with the best phone number for me to call to contact you.

**Calls/ Sessions:** After our initial Foundation Session, our agreement includes \_\_\_\_\_ sessions per month. Ideally, we establish a consistent time that works well for both of us. We will look at these times individually and decide what will support you best. Your first session will be \_\_\_\_\_ in length to allow us to get to know each other and set a positive direction and there is no additional expense for this.

**Changes:** Rescheduling an appointment is easy with advance notice. If you must cancel a call with advanced notice, we will make it up at another time so you have all your scheduled calls during the month or add additional time to appointments already scheduled. Missing an appointment without notice is considered a paid appointment. If you have an emergency we will work around it. If you miss an appointment due to my error in scheduling, or my absence, I will gladly schedule a make-up appointment time, or charge you less for the following month.

**Extra Time:** Call me between our scheduled calls if you need a sounding board, have a problem, or want to share a success with me. I do not bill for additional time of this type, but ask that you keep the calls short. Also, feel free to communicate with me as often as you would like-via email. I check \_\_\_\_\_ regularly during business hours.

**The Coaching Relationship:** Throughout the working relationship the coach will engage in direct and personal conversations. The client can count on the coach to be honest and straightforward in asking questions and making requests. The client understands that the power of the coaching relationship is granted by the client. The coach relationship is professional and strictly confidential.

**Problems:** If I ever say or do something that doesn't feel right, please bring it to my attention during the call. As your coach, I am 100% committed to you being powerful, successful and to you having the life you want.

**Client agreements:** Speaking as you, the client-

1. As a client, I understand that I am fully responsible for my well-being during my coaching call, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy or any form of medical treatment, and that professional referrals will be given if needed.
2. I understand that "health coaching" or "wellness coaching" is a relationship I have with my coach that is designed to facilitate personal exploration and movement towards greater health and wellbeing. I understand that we will work together to determine the lifestyle changes needed and to develop a strategy/plan for achieving those goals.
3. I understand that health/wellness coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, educations and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
4. I understand that health/wellness coaching does not treat mental disorders as described by the American Psychiatric Association. I understand that health/wellness coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment, and I will not use it in place of any form of therapy.
5. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a health/wellness coach and that this person is aware my decision to proceed with the coaching relationship.
6. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.
7. I understand that certain topics may be anonymously shared with other wellness coaching professionals for training or consultation purposes.
8. I understand that health/wellness coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual, or other matters. I understand that all decisions in these areas are exclusively mine, and I acknowledge that my decisions and my actions regarding them are my responsibility.

I have read and agreed to the above.

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Client Signature

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Date