



HERITAGE COACHING

NEW COACHING CLIENT AGREEMENT PACKET

Thank you for choosing Heritage Coaching. This Client service agreement establishes the standards and boundaries of our working together. This agreement authorizes Dennis Gunnarson (doing business as Heritage Coaching) to provide you, the Client, with the services described in this agreement. Outlined below are the policies of Heritage Coaching and a description of what you can expect from the services being provided:

1) THE COACHING RELATIONSHIP

As your Life Coach, Dennis serves as your partner in self-discovery, personal growth, goal-setting and goal-reaching as part coach, part mentor, part teacher, and part accountability partner. The Coach's goal is to help the Client discover within themselves the beliefs or issues that are blocking the Client from getting all the Client wants out of life, and to help elicit from within the Client his/her own best solutions or new ways of being to live more of the life the Client wants to live. Life Coaching is not therapy, and Dennis is not a therapist. A Life Coach does not diagnose or treat disorders. Life Coaching may be effective either as a precursor, complement, or follow-up to therapy. If the Client is currently in therapy, the Client is strongly encouraged to inform his/her therapist that the Client is also engaged in Coaching, to help ensure that the Therapist's and the Coach's work with the Client is mutually supportive toward his/her goals. If the Client is not in therapy, it is possible, depending on individual circumstances, that his/her life Coach may recommend at some point that the Client consult with an appropriate mental-health professional before continuing with further coaching services.

1a) COACH'S COMMITMENT: Coaching is delivered during regularly scheduled sessions by telephone or an internet link such as Skype, unless otherwise arranged. Periodically, in-person sessions can be scheduled at a mutually agreeable location. Regularly scheduled sessions may be augmented with occasional "emergency" or unplanned calls, as needed and as the Coach is available. I do not bill for calls that are 5 minutes or less. Although the Coach works from a basic theoretical model in providing Coaching services, it is actually the Client, the Client, who determines the overall direction of the Coaching, its pace, and eventual outcomes based on his/her level of commitment and focus during the Coaching process. The Coaching services will be based upon the terms set out herein regarding the Coach's standard Terms and Conditions. The Coach will hold all information disclosed in the Coaching sessions in confidence and adhere to the ethical standards stipulated by the International Coach Federation

1b) CLIENT RESPONSIBILITIES: In order for Coaching to be most effective, the Client must make a commitment to take an active part in the process, which may include identifying his/her own goals and desired outcomes, or doing “homework” assignments and follow-up activities on his/her own time between sessions. As the Client, you will supply the agenda or topic of discussion for each session. It is important that you are truthful and authentic, saying what you believe and feel, sharing shortfalls as well as successes – and not just tell the Coach what you think he wants to hear or what the Coach might wish you could truthfully say. Of course, you are also responsible to be on time for the Coaching session, turn off your cell phone/call waiting/pager/etc., pay your coaching fees on time, as agreed upon, and to show up to sessions at agreed-upon times, ready to work. The Coach will assist the you in realizing your potential, and respect your right to make your own informed and responsible decisions; thus, you need to be aware that results cannot be guaranteed, and that the you are entering into this coaching agreement with the understanding that the effort and energy the Client puts into Coaching will largely determine the outcome your experiences, therefore you are fully responsible for your choices and decisions during this coaching experience.

2) COACHING CALLS

2a) Recommend Commitment: A 3-month commitment to bi-weekly sessions (total of 6 sessions). A 3-month commitment will help ensure that you understand that it is hard work to change habits of thinking and acting, and that you are committed to making a concentrated effort and understand that it takes time.

2b) Timing of Calls: Coaching calls typically are 30 minutes. They typically are scheduled weekly or biweekly, but some Clients benefit from more or less frequent contact, and longer or shorter sessions. Fees are based on the actual time on the call, not the number of calls. If you call in for your Coaching session and reach a voicemail message, you should leave a message; your call will be returned promptly, and you will be provided with your complete Coaching time, or it can be rescheduled if that is best for the Client. If you are late for a call, the Coach may need to end the session at the originally scheduled time, although he will extend the call if his schedule allows.

3c) Additional Client Contact with Coach: The Client is welcome to call or e-mail his/her Coach between coaching sessions when you have a challenge, can’t wait to share a success, needs information, or just wants to touch base. This is an added service to the Client, and calls under 5 minutes will not be billed. Longer unscheduled calls will be considered emergency sessions and will be billed at the regular rate (after the first 5 minutes, which are free), with no minimum charge. The Client is

welcome to e-mail his/her Coach as often as he/she would like, however access email responses may be billed if he/she requires more than 20 minutes of the coaches time between each session.

3) FEES AND EXPENSES

3a) Billing rate: Coaching sessions are billed at a rate of US\$75 per half hour. Fees are based on the actual total time on the call, not the number of calls due in advance of Session or on the day of the Session itself.

3b) Cost of telephone calls: Unless otherwise agreed upon, the Client is responsible for initiating the call to the Coach, and the Client bears any cost connected with the call. An audio Internet link, or an audio and video link with a Web cam, is also available for Clients who prefer to call via Skype or a similar service.

3c) Client cancellation of a scheduled appointment: The Client remains responsible for coaching session fees for any regularly scheduled calls that the Client cancels with less than 48 hour notice. Cancellation notice should be given by phone (not email) whenever possible otherwise a Late Notice Fee of \$35.00 will be incurred by the Client. Heritage Coaching is under no obligation to refund or reschedule a coaching session unless sufficient advance cancellation notice has been received.

3d) Coach no-show: If the Coach misses a scheduled call without advance cancellation notice, he will offer the Client the option of either rescheduling the call at a mutually agreeable time or receiving a free US \$25 credit toward the next regularly scheduled call.

3e) Unscheduled "emergency" sessions: As noted in 3a above, unscheduled calls lasting longer than 5 minutes will be considered emergency sessions and will be billed at the regular rate (after the first 5 minutes, which are free), with no minimum charge.

3f) No charge for initial exploratory session: Before agreeing to work together, Coach and prospective Client will have an initial, no-fee "get acquainted" session to determine whether both feel reasonably confident that the prospective Client can benefit from the Coaching relationship, that the Coach has the appropriate expertise to assist the prospective Client, and that the rapport between them is likely to result in a supportive Coach-Client relationship.

3g) Unused package fees: If the Client finds that he/she is unable to use his/her sessions for any reason, the Client may put the remaining sessions on a 3-month hold. Session credits will not be carried out

further than 3-months. Coaching fees are nonrefundable should the Client decide to “quit” the process, as our intake session is designed to remove the possibility that we would not be a good fit for each other.

3h) Fees payable in advance of coaching sessions: Fees are payable by the month, for all the scheduled or anticipated coaching sessions for that month, in advance of the first coaching session of the month. In unusual circumstances, the Client may request a weekly or bi-weekly payment schedule, with payment due in advance of the scheduled one- or two-week period. A block payment of three months, paid in advance, will be eligible for a 10% discount.

3i) Payment methods accepted: Heritage Coaching accepts credit card payments made online at www.LifeCoachWorldwide.com through PayPal, the secure payment processor for Heritage Coaching. Or, if they prefer, Clients may send checks or money orders made out to Heritage Coaching to: Heritage Coaching. **Please note that a charge of US\$25 will be automatically applied for any checks returned by the bank, and that the Client will also be liable for all associated bank penalties incurred.

4) TERMINATION OF COACHING SERVICES

To get the greatest benefit out of working together, the Coach and Client normally should begin the Coaching relationship with the intention of working together for an initial period of at least three months. Either party may end the Coaching relationship at any point, for any reason. However, the Client and Coach must agree on a final session by telephone before concluding the Coaching relationship. The Client agrees not to terminate this coaching experience through an email notice alone, or by simply discontinuing communication with the Coach, without a concluding coaching session by telephone. Reasons the Coach may terminate this Agreement include failure of the Client to perform or observe any of the terms of this Agreement, the Client cancels more than 3 Sessions during the Coaching Period, an insolvency event occurs in relation to the Client (e.g. bankruptcy, arrangement or court order is made or proposed in relation to all or any of The Client’s assets), or non-payment becomes an issue.

5) CONFIDENTIALITY

5a) General confidentiality commitment: The Client's identity, the Client/Coach relationship, and nature and content of the Client's work with Dennis Gunnarson and Heritage Coaching will remain private and confidential, and neither the Coach nor Heritage Coaching will share any information about the Client with a third party unless you consent in writing (email is acceptable) to allow the Coach to discuss your work with specific parties for specific reasons that benefit the Client.

5b) Exceptions to confidentiality:

- 1)** In the course of their regular clerical duties, staff supporting Heritage Coaching may be privy to name and limited contact information regarding the Client, but will have no access to information as to the content of the coaching sessions or matters discussed during coaching. Staff supporting Heritage Coaching will be under the same strict requirements of confidentiality as is the Coach himself.
- 2)** In the event that the Coach believes there is clear and imminent danger to the life and physical safety of the Client or others, the Coach may need to disclose selected information in order to make appropriate and potentially life-saving interventions.
- 3)** In highly unusual circumstances, legal requirements may demand that confidential material be revealed.
- 4)** If a Client publicly makes false and slanderous claims about the Coach's work with the Client, with the intent to harm Heritage Coaching or Dennis Gunnarson personally and professionally, Dennis Gunnarson shall be at liberty to respond publicly to those false charges in order to protect his own personal and professional reputation.

6) HOLD HARMLESS

The Client acknowledges that he/she has engaged the Coach solely as an independent contractor. As an independent contractor the Coach has no authority to bind or represent any other party in any way. The Client shall not hold any party liable for any act, matter or thing done or to be done by the Coach in the course of the coaching or the sessions. The Client agrees to utilize Heritage Coaching services with the full understanding that Dennis Gunnarson, Heritage Coaching, and supporting staff are in no way responsible or liable for his/her decisions, actions and their outcomes. The Client also agree to hold Dennis Gunnarson, Heritage Coaching, their employees and volunteers free of all liability and responsibility for

any adverse situations created as a direct or indirect result of a specific referral, advice given, or any actions taken while working with or as a result of working with Heritage Coaching and/or Dennis Gunnarson.

Client understands principles, methods and tools used are meant to challenge, uplift, and support the Client psychologically. However, Coaching is not psychotherapy. If his/her psychological stress is interfering with his/her ability to function, the Client is encouraged to seek help from a professional counselor. Life Coaching may augment his/her therapy, but the work of coaching is meant to be done when major emotional and psychological wounds are already healing or healed.

The Clients signature below certifies understanding of, and agreement with, the following:

I, the Client, agree to utilize Heritage Coaching services with the full understanding that Dennis Gunnarson, Heritage Coaching, and supporting staff are in no way responsible or liable for my decisions, actions and their outcomes. I also agree to hold Dennis Gunnarson, Heritage Coaching and supporting staff free of all liability and responsibility for any adverse situations created as a direct or indirect result of a specific referral, advice given, or my actions taken while working with or as a result of working with Heritage Coaching.

I have read this Client service agreement and agree to abide by its terms and conditions, and acknowledge receipt of my own copy of this Agreement.

Client's Acceptance: _____ Date: _____

Heritage Coaching requires the above Client's acceptance prior to commencing Life Coaching work.

CLIENT INTAKE INFORMATION

I, your Coach, am excited to embark on this journey with you, the Client, and look forward to getting to know you better over the coming months. It would be helpful to me if you would complete the following basic information and email it back to me before our first session.

Client Name _____
 Address _____
 City, State, Zip _____
 Day Phone _____ (☐ C ☐ H ☐ W) Evening _____ (☐ C ☐ H ☐ W)
 Email _____ (☐ H ☐ W)
 Birthday _____ Partner's Name _____
 Occupation/Employer _____

Children (name, age format):

The most important thing that I should know about me, the Client, right now is:

COACHING TERMS:

This agreement, between Coach Dennis Gunnarson, Life Coach and the above- named Client will begin on _____ and will continue for a period of _____ months. Coaching sessions will occur:

- ☐ Weekly for _____ minutes
- ☐ Twice a month for _____ minutes
- ☐ Once a month for _____ minutes

Ending on _____ for a total monthly fee of _____

**Each month must be prepaid. Client will receive 10% discount for prepaying 3 months in advance.*

Sessions will be on: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Time: _____ ☐ a.m. ☐ p.m.

Time zone: ☐ Pacific ☐ Mountain ☐ Central ☐ Eastern ☐ Other _____

PROCEDURES:

- ☐ The Client will call at our scheduled appointment time.
- ☐ The Client will be available for the Coach to call them at the phone number provided above.
- ☐ The Client will provide an alternate phone number to the phone number provided, 24 hours prior to the appointment scheduled.

*****This form can be completed on your computer by choosing the sign drop down option in the right upper corner and choosing the appropriate input options.***

Please complete and return this page before beginning the first Coaching session.