

PERSONAL COACHING AGREEMENT

Thank you for making me a part of your financial plan. I look forward to serving your needs! To help guide our relationship, I ask that you review the information below.

Scheduling Appointment

To schedule appointments, please follow the email instructions and the link provided. Available days and times will be listed. I understand that your time and resources are extremely valuable, so I ask that you honor your scheduled appointment time. If you need to reschedule, just let me know at least 24 hours in advance. Appointments can be conducted over the phone, via video conference, or at a mutually agreed upon public venue.

Spousal Participation

If you are married/engaged/dating and this is a couples Coaching Agreement, both people must participate and commit to all scheduled coaching sessions. If both parties are not available for an appointment, we will reschedule.

Refund Policy

I do not offer refunds for our coaching services as we are a fee-for-time service. I promise that you will get out of the coaching session what you put into it.

Coaching Sessions

We assume the responsibility of understanding and evaluating your current needs, goals, and resources in order to develop a strategy to meet your objectives. However, in order to make your plan work, we expect that you will come prepared to take the steps necessary to succeed, take full responsibility for your plan and its implementation, and contact us when you need additional advice and direction.

Paperwork

You are asked to complete preliminary paperwork to better prepare me as your coach. We ask that these forms be filled out to the very best of your knowledge and ability prior to your scheduled appointment. You assume all responsibility for providing accurate and complete materials, documentation, and facts upon which my coaching may be based. for your plan and its implementation, and contact us when you need additional advice and direction.

Rescheduling Appointments

If you need to reschedule your session for any reason, please give me at least 24-hour advance notice.

Confidentiality Policy

We will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to me or we generate. We will reveal such matters only upon receipt of a written authorization and clear, verifiable instructions from you telling us exactly what we may reveal.

Disclaimer

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. We are not authorized to render legal, accounting, or other professional advice. Since your situation is fact dependent, you must additionally seek the services of an appropriate licensed legal, accounting, or investment service.

Coaching Session Rules

These rules and guidelines are designed to keep everyone focused on the future while dealing with the past in a positive and constructive manner.

1. TEAM

There is no You, He, She, They in TEAM. WE are the TEAM. I am on the TEAM. And together the TEAM will move forward and goals will be achieved.

2. ENGAGED

All parties of the team have to be engaged and participate fully in order for the goals to be achieved. That is the objective.

[COACH]

Michael Redmond

[PRINT NAME]

[SIGNATURE]

[DATE]

[CLIENT]

[PRINT NAME]

[SIGNATURE]

[DATE]

[CLIENT]

[PRINT NAME]

[SIGNATURE]

[DATE]