

More Than Financial Coaching

Achieve more of what matters with a coach who helps you focus.

Coaching Agreement

This coaching agreement is for _____ (Client Name), based on the core competencies defined by the International Coach Federation. Each individual's path to change is unique, so I use a customized coaching approach for each client. My focus is on supporting the personal development and growth of an emotionally healthy client, with feedback provided after each session.

Coaching is a partnership that engages us in a thought-provoking, creative process, inspiring you to maximize your personal, professional, and spiritual potential. In this relationship, you are the expert, and my role is to draw out your insights, experiences, and truth. Coaching fosters discovery on your part as I support a healthy mindset and help elicit solutions and strategies that lead to intentional action.

Understanding What Coaching Is Not

It's important to understand that coaching is not therapy, counseling, advice-giving, mental health care, or treatment for substance abuse. I am not a licensed mental health professional or therapist. Coaching is not a replacement for professional counseling, psychiatric interventions, treatment for mental illness, recovery from past abuse, medical advice, financial assistance, investment advice, legal counsel, or any other professional service.

Coaching Sessions and Fees

You agree to fully engage in the process to increase the likelihood of reaching your objectives. We will meet for _____ sessions, and you will compensate me at a rate of \$_____ per session, payable within 7 days of each session. It's your responsibility to schedule future sessions, either at the beginning of our work, at the end of a session, or at least one week before the requested date. Our meeting method will be mutually agreed upon. For long-distance coaching, we will select a preferred method together, with you initiating the call.

Appointments may be rescheduled with 48-hour notice, and each session will last up to 60 minutes. Either of us may end our coaching relationship at any time by providing written notice.

If any situation requires a change in our agreement, we will create a time frame to address the issue and reach a mutual resolution that honors our coach-client relationship.

Confidentiality Agreement

All information discussed and shared during our coaching sessions will be strictly confidential. I will treat your willingness to be open with the utmost respect. However, I want you to understand that the coach-

client relationship is not a legally privileged relationship like attorney-client or therapist-client, so our communications are not subject to legal protections in court.

I may need to share information if: I'm legally required to by court order or subpoena; I reasonably believe there is imminent risk of danger or harm to you or others; or the information involves illegal activity. Sessions will be conducted verbally, not through written forms (texts, instant messaging, or email). Any notes I take during sessions will remain confidential, secured, and used solely for my benefit.

Your Participation and Responsibility

Your participation in coaching is entirely voluntary. You assume any risks that come with participating in coaching, including any actions or inactions resulting from our sessions. I cannot guarantee or warrant specific results from our coaching work—outcomes vary for each person based on many factors. This agreement may be terminated by either party at any time. Termination should be delivered in writing.

By entering this coaching relationship, we each release the other from liabilities, claims, actions, damages, costs, or expenses related to our coaching work together. We both agree to hold each other harmless against such claims, including attorney's fees and costs. This includes any claims based on negligence, action, or inaction during or after our coaching relationship.

Acceptance of Agreement

The signatures below signify our mutual agreement and understanding of the terms outlined in this agreement, acknowledging acceptance of services rendered.

Brian L. Davidhizar, M.S., CCC, CIPM®

Client

Date

Date

