



## Bold Heart Coaching Agreement

Please review, adjust, sign where indicated, and scan and email to [chuck@boldheartcoaching.com](mailto:chuck@boldheartcoaching.com).

NAME \_\_\_\_\_

INITIAL TERM \_\_\_\_\_ MONTHS, FROM \_\_\_\_\_ THROUGH \_\_\_\_\_

FEE \$ \_\_\_\_\_ PER MONTH, \$ \_\_\_\_\_ FOR THE PROJECT

SESSION DAY \_\_\_\_\_ SESSION TIME \_\_\_\_\_

NUMBER OF SESSIONS PER MONTH \_\_\_\_\_

DURATION \_\_\_\_\_ (length of scheduled session)

REFERRED BY: \_\_\_\_\_

### BASIC EXPECTATIONS:

- 1) CLIENT CALLS THE COACH AT THE SCHEDULED TIME.
- 2) CLIENT PAYS COACHING FEES IN ADVANCE
- 3) CLIENT PAYS FOR LONG-DISTANCE CHARGES, IF ANY.

1. I understand that "coaching" is a Professional-Client relationship I have with my coach that is designed to facilitate the creation/development of personal, professional or business goals and to develop and carry out a strategy/plan for achieving those goals.
2. I understand that coaching is designed to address issues the person being coached would like to consider. These could include (but are not limited to) career development, relationship enhancement, spiritual growth, lifestyle management, life balance, decision-making, and achieving short-term or long-term goals. I acknowledge that deciding how to handle these issues, incorporate coaching into those areas, and implement my choices is exclusively my responsibility.
3. I understand that coaching can involve brainstorming, values clarification, the completion of written assignments, education, goal-setting, identifying plans of action, accountability, making requests, agreements to change behavior, examining lifestyles, and questioning.
4. I understand and agree that I am fully responsible for my physical, mental and emotional well-being during my coaching calls, including my choices and decisions. I am aware that coaching will be an ongoing relationship that may take a number of months, although either party can terminate the relationship at any time.



5. Both parties will be diligent and prompt for sessions in order to make the most of their time together. If either party must cancel or re-schedule, it will be done at least twenty-four (24) hours in advance. Missed sessions and failing to cancel with the required notice, excepting emergencies, will result in being billed for the session.
6. Coaching is a confidential relationship and the coach agrees to keep all information strictly confidential, except in those situations where such confidentiality would violate the law, where permission has been granted, and with respect to tracking names, hours coached, and contact information where necessary for coaching certification.
7. I understand that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association. I understand that 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 diagnosis, treatment or therapy.
8. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with the mental health care provider regarding the advisability of working with a coach and that this person is aware of my decision to proceed with the coaching relationship.
9. I understand that coaching is not to be used as a substitute for professional advice by legal, medical, financial, business, spiritual or other qualified professionals. I will seek independent 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 sole responsibility.
10. Each of the people whose signatures appear below agrees that this agreement represents our mutual understanding of the coaching relationship.

I have read and agree to the above.

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Signature (person being coached)	Date
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Signature (coach)	Date
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