

Retainer Agreement



Introduction. I'm excited to coaching and consulting you so that we can launch into a greater vision for your life and accelerate your results at work. To get this exciting adventure started, here are few guidelines we need to establish to ensure that our working relationship is as productive as possible. If you have any questions, please call us.

Trust. Our relationship needs to be built on genuine respect and integrity with one another. We also seek to speak with acceptance, openness & in a straightforward manner. Therefore, if at any time you are dissatisfied with something, please bring it up! I will work with you to resolve any difficulties.

Confidentiality. Although we may publicize that we are in a coaching and consulting relationship, confidentiality will be upheld by both of us on the specific details that are shared unless there is a threat on someone (ourselves, another, etc.). Disclosure of our conversations beyond these confines can be made by you, the client.

In the case of us providing services to more than one person on your staff, we will keep this confidentiality promise except for the occasional status updates on our relationship (dates, milestones, etc.). Like the statement above, disclosure of these conversations must be made by the individual staff members if they desire information to be shared with any other person.

Preparation. It is imperative that you apply yourself if this is to be successful. Our work will be very purposeful, goal-oriented and dependent on you doing some 'homework'. Sometimes it will be very broad in scope, requiring that you take time to assess where you are in light of your goals. Either way, your real growth will come from the work that you do in the time between the appointments. I do not have the answers you are looking for, but I will partner with you as you seek them from the One who does.

Appointments. Sessions will be roughly 60-90 minutes in length and will be conducted in person, on the phone or over Skype, FaceTime, etc. Cancellations need to be made at least 24 hours in advance. Cancellations within 24 hours or missed appointments will not be refunded.

Rates. Please see our fee schedule or talk to us about your rates. While our rates may change during this agreement, we'll communicate that to you upfront.

Additional services and changes in rates may be agreed to verbally by both parties and need not require a revision of this agreement. Should our time consistently fall short or exceed the amount of work promised, we will contact one another to renegotiate these terms.

Additional Time. You are encouraged to contact me between scheduled calls by email, text or brief calls with questions, struggles, or to celebrate successes. If a phone call, Skype, FaceTime, etc. I enjoy providing this extra level of service and find that those who use it seem to make greater progress.

Training and Credentialing. I do train other coaches and future employees to do what I do. Periodically, I may ask if one of them may sit in for observation. There is no requirement upon you that you agree so feel free to decline if you desire. Second, I am always working on improving my skills. There will be times that my continuing education or ICF credentialing requires me to report who I've coached, but not the contents of our sessions. I will give your name, dates of the coaching relationship, total hours coached and your contact information. You may be contacted by ICF to verify that you were indeed coached by me. But rest assured, your coaching will remain confidential by me as well as those that I am training.

Professional Services. Coaching is not therapy nor to be used as a substitute for professional advice by legal, mental, medical or other qualified professionals, and we encourage you to seek independent professional guidance for such matters. As such, I am not liable for any actions or inaction, or for any direct or indirect result of any services provided. Furthermore, if you are currently under the care of a mental health professional, I would like to know and recommend that you inform the mental health care provider of our relationship.

HAVE YOU READ AND DO YOU AGREE TO THE ABOVE?

SIGNATURE _____ **DATE** _____

PRINT NAME _____

PHONE _____ **EMAIL** _____