

**Palmetto Counseling & Consulting Services, LLC ("Palmetto")**

Name:

DOB:

Date:

**LIFE COACHING CLIENT SERVICE AGREEMENT**

Welcome to Palmetto for your life coaching services - I am excited to begin our work together! This document constitutes a contract between us [the "Agreement"]. You should read it carefully and address any questions or concerns that you have before you sign it.

Date: \_\_\_\_\_

**I. Contact Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Fax Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

**II. Personal Information**

Your Birth Date: \_\_\_\_\_

Current occupation: \_\_\_\_\_ Present Company: \_\_\_\_\_

Current Health Problems: \_\_\_\_\_

Current Medications: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_

Emergency Contact Address: \_\_\_\_\_

Emergency Contact Phone: \_\_\_\_\_ Emergency Contact Cell: \_\_\_\_\_

Have you worked with a Life Coach before? Y / N If so, when/why? \_\_\_\_\_

How do you like to learn? (Circle each one that applies) Visual, Tactile, Auditory, Verbal, Kinesthetic, Cerebral

Favorite Hobbies/Sports/Interests: \_\_\_\_\_

What goals would you like to accomplish from your time working with your coach?

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### **Life Coaching Services**

The services provided by Palmetto include Life Coaching [which sessions may take place during 1:1 / face-to-face meetings, by telephone, webcam such as Skype, or by secure email] on topics decided jointly with you, the client. The purpose of life coaching is to develop and implement strategies to help you reach personally identified goals of enhanced performance and personal satisfaction. Life coaching may address a variety of goals including completion of personal or business projects, enhance life balance, job performance and satisfaction, develop new skills, attain personal growth, achieve goals, manage life change, cope with personal challenges, or general conditions in client's life, business, or profession.

### **The Coaching Relationship & Goodness of Fit**

As your coach, your life coach serves as your partner in self-discovery, accountability, personal growth, goal-setting and goal-attainment. Life coaching is not therapy. A life coach does not diagnose or treat disorders. Although there are some similarities between life coaching and psychotherapy, Life coaching is not intended to replace or be a substitute for psychotherapy; which is a health care service with its primary focus to identify, diagnose and treat nervous, behavioral, and mental health disorders. If you are currently in therapy, we recommended that you inform your therapist that you are participating in life coaching, to ensure that your work in therapy is mutually supportive toward your goals and needs. If you are not in therapy, depending on individual circumstances [e.g., client's needs are outside the scope of life coaching and would be better addressed through psychotherapy]; your life coach may recommend that you consult with an appropriate mental health professional before continuing with life coaching services.

To help decide if life coaching is right for you, Life Coach offers an initial, one-time free telephone consultation so you can "see if we are the right fit" for the goals you would like to achieve.

It is important to understand that Life Coaching is a professional relationship. While it may feel at times like a close personal relationship, the relationship cannot extend beyond professional boundaries, either during or after our work together. Again, this is important as research has shown that when boundaries blur, any progress or gains achieved from life coaching can be jeopardized or even lost.

### **Life Coaching Sessions**

Life coaching sessions are delivered during scheduled sessions which may take place during 1:1 / face-to-face meetings, by telephone, webcam such as Skype, or by secure email, unless otherwise arranged. As part of the life coaching process, you may email your life coach between sessions to ask questions, receive feedback on problems or concerns you may be experiencing, or to update your life coach on your progress and accomplishments. At times, our regularly scheduled sessions may be supplemented with the occasional "emergency" or unplanned call, as needed and your life coach's availability. This may be important for clients that are dealing with very stressful situations or working on a tight deadline to complete a personal or business project.

### **Scheduling**

Life coaching sessions will be scheduled at the mutual convenience of the Life Coach and the Client. The day and time for the next session will be scheduled at the close of each coaching session.

## **Call Procedure**

The Client will call their Life Coach at the pre-arranged time and telephone number and pays the telephone charges for the call.

## **Cancellations**

Please remember that you **must give 24 hours advanced** notice if you need to cancel or change the time of an appointment, otherwise you will be charged for the session in full. Your Life Coach will make reasonable efforts to reschedule sessions which are cancelled within the required 24-hours notice.

## **Life Coaching Format**

- Free, Brief Initial Telephone Consultation
- 60 to 90 minute 1:1 / Face-To-Face Life Coaching Assessment to help define and determine goals / outcomes you would like to achieve from your life coaching sessions
- Unlimited Email support via secure Email
- Occasional, brief check-in calls
- Follow-up 1:1 / Face-To-Face Life Coaching Sessions as determined by Pre-Paid Life Coaching Package

## **Client Responsibilities & Life Coaching Outcomes**

As your Life Coach, my role is to help you develop and better understand the skills, strengths, and attributes that you already possess as well as:

1. Make decisions about the changes you would like to make [this includes a list of coaching goals and objectives];
2. Develop an action plan to help you make these desired changes;
3. Provide you advisement, feedback, encouragement, accountability, and coaching tips as we implement the plan and help address any obstacles or challenges that you encounter along the way;
4. Develop strategies to help maintain the changes you have made. As your Life Coach, I will provide support, encouragement, offer honest, unbiased and constructive feedback, and accountability to help keep you on track as you work toward your goals.

Although your life coach works from a theoretical framework to provide coaching services, it is actually you, the client, who determines the agenda, pace, and eventual outcomes as your success will depend on your willingness and commitment to take 'healthy' risks and try out new approaches during the coaching process. In order for you to receive the most benefit from your life coaching sessions, the client must commit to take an active part in the coaching process, which may include identifying your own goals and preferred outcomes, completing homework assignments and follow-up activities between coaching sessions. As noted above, you can expect your life coach to be honest, direct, unbiased, and straightforward and help you move past obstacles [which may include working through and 'unlearning' or challenging bad habits or behaviors] that have prevented you from achieving your goals in the past. It is important that you, as the client, be honest and truthful in evaluating your own progress and immediately share with your life coach if your coaching is not working as you originally hoped so that we both can take steps to change the direction of your life coaching.

## **Risks vs. Benefits**

Although life coaching can provide many positive benefits and outcomes, there are risks associated with the coaching process. While very minimal, these risks may include client experiencing feelings of distress and frustration associated with the process of change. The coach will help you realize your own potential, and respects your right to make your own informed and responsible decisions. Subsequently, you, as the client, need to be aware that results cannot be guaranteed, and that you are entering into coaching with the

understanding that the effort and follow through you put into coaching will largely determine the outcomes you experience.

Client understands and agrees to pay all coaching fees as agreed upon and to arrive / be available /show up on time for all life coaching sessions [during scheduled face-to-face meetings, by telephone, or by Webcam / Skype session].

**Client cancellation of a scheduled session:** Client will be responsible for life coaching session fees for any scheduled session that client cancels with less than 24 hours advance notice. Cancellation notice shall be provided via telephone (not email). Life Coach/ Palmetto is under no obligation to refund or reschedule a coaching session unless advance cancellation notice has been received.

**Additional Contact with Life Coach:** Client may email Life Coach between sessions to ask questions, receive feedback on problems or concerns you may be experiencing, or to update your life coach on your progress and accomplishments. In the event you need to telephone your life coach between regularly scheduled sessions, telephone calls under 10 minutes will not be billed. Longer, unscheduled calls will be considered emergency sessions and will be billed at the rate of US \$85 an hour [or at prorated hourly rate for calls less than one hour].

**Cost of telephone calls:** Unless otherwise agreed upon, the client is responsible for initiating the telephone call to Life Coach, and client will be responsible for the cost of the telephone 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.

**No charge for initial telephone consultation:** Before agreeing to work together, life coach and prospective client may have the opportunity for an initial, no-fee, brief telephone consultation session to determine whether both feel reasonably confident that the prospective client can benefit from the coaching relationship, that the coach has the knowledge and expertise to assist the prospective client, and that the rapport between them is likely to result in a supportive coach-client relationship.

**Payment:** Palmetto accepts credit/debit card [Visa, MasterCard, Discover, Amex. Clients may send checks made out to Palmetto Counseling & Consulting Services, LLC:

**Palmetto Counseling & Consulting Services, LLC**  
**1721 Ebenezer Road, Suite #225**  
**Rock Hill, SC 29732**

Please note that a **charge of \$42.00** will be automatically applied for any checks returned by the bank, and that you will be liable for all associated bank penalties incurred.

### **Mutual Nondisclosure**

Life Coach and Client mutually recognize that they may discuss future plans, business affairs, job information, financial information, goals, personal information, and other private matters. The Coach will not voluntarily disclose Client's information to a third party without Client's written consent. To protect Palmetto's intellectual property, Client likewise agrees not to disclose or communicate about Palmetto's practice, materials, or methods to any third parties.

### **CONFIDENTIALITY**

**General confidentiality commitment:** Client's identity, relationship to life coach, and nature and content of client's work with Life Coach will remain private and confidential, and will not disclose information about the client with a third party unless client provides written consent.

#### **Exceptions to confidentiality:**

- 1)** As part of their roles performing administrative or clerical responsibilities, Palmetto support staff may be privy to name and limited contact information of clients, but will not have access to confidential information associated with the content of client's life coaching sessions or matters discussed during coaching. Administrative and support

staff at Palmetto are bound by the same strict requirements of confidentiality as the Life Coach.

**2) In certain cases, your Life Coach may be legally obligated to breach confidentiality in order to protect others from harm, including:**

- a. In the event Life Coach has reason to suspect that a child, elderly, or disabled person is being abused, the coach must report to the appropriate state authority or law enforcement agency;
- b. If client is at imminent risk to harm himself /herself or makes threats of imminent violence against another person, Life Coach is required to take protective actions.
- c. Your Life Coach may release information when required by law. For example, Life Coach may use or disclose your information when responding to a court order or if Client files a complaint or lawsuit against Life Coach/ Palmetto, Life Coach /Palmetto may disclose relevant information regarding that client in order to defend Life Coach / Palmetto Counseling & Consulting Services, LLC ("Palmetto").

The situations above rarely occur in coaching practices, but if a situation does occur, Life Coach will make every effort to discuss it with you before taking any action.

**3) Privacy and the Internet / Electronic Transmissions**

Although measures can be taken to reduce risk, it is impossible to protect the confidentiality of information transmitted electronically [e.g., via email, chat room, and other forms of Internet-Based communication]. This is particularly true of email and information stored on computers connected to the internet [unless password protection and encryption and other forms of security protection are utilized]. As a precaution, Life Coach advises that Client not send communication via unsecure email and recommends the use of security programs along with password protection/ encryption methods to minimize these risks.

**Dispute Resolutions**

Any controversy or claim arising out of or relating to this agreement, or the breach of this agreement, shall be settled by arbitration, which will occur via telephone by an arbitrator that both parties mutually agrees upon. The costs of the arbitration shall be borne by the losing party.

**TERMINATION**

Either party may end the coaching relationship by providing the other party with a two-week written notice so we can have an effective closure. Before termination of the coaching relationship, client and Life Coach agree to settle financially, with the client paying for all life coaching sessions and services received to date, as agreed.

**Life Coach Disclaimer of Liability**

Client hereby employs Palmetto as Life Coach to develop and implement strategies to help you reach personally identified goals of enhanced performance and personal satisfaction in terms of Client's business and personal life, developing interpersonal relationships and assistance with setting and achieving Client's goals. Life Coach / Palmetto has experience in such matters and agrees to render such life coaching services.

Client understands and agrees that Life Coach / Palmetto is not an employment agent, business manager, financial analyst, or medical doctor and that Life Coach / Palmetto has not promised, shall not be obligated to, and will not:

- 1.) Procure or attempt to procure any employment, business, or sales for the Client;
- 2.) Perform any business management functions such as accounting services, tax or investment consulting, or advice with regard thereto; or
- 3.) Diagnose, treat, or prescribe for any medical condition; and

4). You, as the client, understand and agree that results cannot be guaranteed, and that you are entering into life coaching with the understanding that the effort and follow through you put into coaching will largely determine the outcomes you experience.

**Your signature below certifies understanding of, and agreement with, the following:**

I agree to utilize Palmetto's Life Coaching services with the full understanding that Palmetto, their employees, contactors, volunteers and directors are in no way responsible or liable for my decisions, actions and their outcomes. I also agree to hold Palmetto, their employees, contractors, volunteers and directors 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 Palmetto or any of its Life Coaches.

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 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Staff Witness: \_\_\_\_\_ Date: \_\_\_\_\_

**Palmetto requires the above client signature prior to commencing life coaching work. Please complete and then present in-person or mail **signed** copy of this page to:**

**Palmetto Counseling & Consulting Services, LLC  
1721 Ebenezer Road, Suite #225  
Rock Hill, SC 29732**

## COACHING PROFILE

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**Name:**

**Phone: (h)                      (cell)                      (office)                      (Fax)**

**Address:**

**Employer:**

**Email:**

**Work Address:**

**Date of Birth:**

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**Do the best you can to complete the following questions. Do it as quickly as possible so your answers reflect your initial intuitive responses (i.e., do not over-analyze!). Your responses can reflect your personal or business areas of your life (or both). There are no right or wrong answers.**

- 1. What do you want your primary focus to be right now? What is most important for you to accomplish? Please be specific and personal.**
  - a).
  - b).
  - c).
- 2. For #1, what changes or actions are needed for these to be accomplished?**
- 3. What do you need to let go / move on from in order to move forward in these areas? What are some of the obstacles in your way?**
- 4. Do you have a sense of your life purpose? If so, how do you know it's the right one for you? How does it impact you day to day? Do others know it or is it something you keep to yourself?**

**5. What are your top ten goals that you would like to achieve for yourself? Be sure these are things that are meaningful to you (and not things you "should do" or things that others want for you)**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

**6. What are the things that make you happiest and/or experience the most joy?**

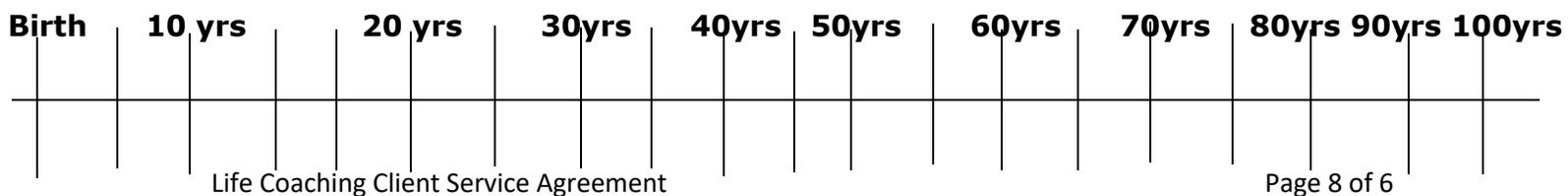
**7. When or where do you experience the most fulfillment? When are you at your best?**

**8. What are your greatest strengths?**

**9. What do you consider your greatest accomplishments?**

**10. What's missing in your life that, were it present, would make your life more fulfilling?**

**11. Using the timeline below, please identify / summarize significant events in your life (both positive and negative) that have influenced you and shaped your life:**



- **What were some of the highlights?**

- **What obstacles did you overcome?**

**12. If you had total and complete trust in your coach, what advice would you give him / her about how to best coach you?**

**13. As your coach, how can I be the most help to you during our coaching sessions?**

**14. What else would you like your coach to know about you?**