

Welcome Pack

Hello!

I appreciate the opportunity to be your coach and I look forward to working with you to accomplish your most important goals. Please review the following items that are checked and return the relevant documents to me by mail or you can give them to me at our first session. I will forward an intake form once you have agreed to the terms outlined. Thank you.

Coaching Agreement

Coaching Fee

Our meetings will be scheduled for a time that works for both of us; subsequent sessions will be scheduled at the close of each session.

In the meantime, please don't hesitate to e-mail or call me if you have any questions.

Warmest regards,

Karen Poole
Coach

e-mail: dreams-revealed@peoplepc.com
607 936-1739
607 368-3500
Corning, NY.

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**Coaching Fee**  
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Client Name_____

FEE PLAN

\$75 per session. Generally calls or meetings are for 45 minutes, three times per month.

Payment Procedure:

The Coach is paid at the conclusion of each coaching meeting. The first coaching session begins after this agreement is signed and returned. We will continue to work on the goals that you define unless you want to discontinue, which we will do whenever you request that.

Terms of Coaching:

Coaching is a process and the length of this process is different for everyone. Clients can stay involved in coaching from 3 months to two years. It ultimately depends on how quickly you move forward in reaching your goals. It is **suggested** that you make a commitment of 3 months initially. After that, we will discuss your status and determine what is appropriate in order for you to sustain the life you desired. We then will decide on a commitment from month to month.

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## The Coaching Agreement

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This document (the Coaching Agreement) and attachments constitute a contract between us. You should read it carefully and raise any questions and concerns that you have before you sign it.

Services:

The services provided by Karen Poole include personal and tele-coaching on topics decided jointly with you, the client. The purpose of coaching is to develop and implement strategies to help you reach personally identified goals and a more satisfying and enriched life. Coaching may address a wide variety of goals including personal projects, life balance, business/career achievements, physical wellness or general conditions in the client's life. Other coaching services include personal strategic planning, values clarification and brainstorming.

As the client, you agree to the following:

1. That I am fully responsible for my physical, mental and emotional well-being during my coaching sessions, including my choices and decisions.
2. I understand that coaching does not involve the diagnosis or treatment of mental health disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitution for counseling, psychotherapy, mental health care or substance abuse treatment and I will not use it in place of any form of diagnosis treatment or therapy.
3. If I am receiving mental health treatment, I agree to consult with my mental health provider regarding the advisability of working with a coach and that this person is aware of my decision to proceed with the coaching relationship.
4. I understand that coaching is not used as a substitute for professional advice by legal, medical, financial, business, spiritual or other qualified professionals. I understand that all decisions in these areas are exclusively mine and I acknowledge that my actions and decisions regarding them are my responsibility.

5. Be on time for our scheduled appointment.
6. Keep all appointments, unless otherwise arranged. If there is a need to cancel, I will make every effort to contact my coach within 24 hours unless for emergencies.
7. If at any time I feel that my needs are not being met, or I am not getting what is expected of coaching, I will inform my coach so that an adjustment can be made to the coaching program as needed.

As the coach, I agree to the following:

1. To be on time to our scheduled appointments.
2. To keep all appointments and to contact you within 24 hours if a cancellation or re-scheduling needs to occur.
3. To be committed to helping you realize your fullest potential in areas that you value
4. To respect and honor our alliance.
5. To hold you accountable for reaching your goals.

Confidentiality:

As a coach, I protect the **confidentiality** of the communications with my clients. Your willingness to be open and truthful will be treated with ultimate respect. I will **only** release information about our work to others with your written permission, or if I am required to do so by a court order. There are some situations which I am legally obligated to breach confidentiality in order to protect others from harm, including (1) if I have information that indicates that a child, elderly or disabled person is being abused; I must report that to the appropriate state agency and (2) if a client is in imminent risk to him/herself or makes threats of imminent violence against another person; I am required to take protective actions. These situations rarely occur in coaching practices. However, if such a situation does occur, I will make every effort to discuss it with you before taking any action.

Although I have experience as a counselor, I am not a licensed mental health therapist or licensed counselor; coaching is not therapy or counseling. Coaches offer skills in the areas of communication, problem-solving and behavior change. The coaching sessions involve direct communication; you can count on me to be honest and straightforward, while asking powerful questions that will help move you forward. The purpose of engaging a coach is so that you can identify goals that you

want to reach and making a plan for getting there. If it is determined that you may benefit from more intensive support than what coaching can provide, your coach will make every effort to refer you to the best professional in your community.

Termination:

Either party may end the coaching relationship by providing the other party with a one-week written notice, which may be sent via email or regular mail.

Mutual Nondisclosure:

The Coach and client mutually recognize that they may discuss future plans, business affairs, financial information, job information, goals, personal information and any other private information. The Coach will not voluntarily communicate the client's information to a third party. In order to honor and protect the Coach's intellectual property, the Client likewise agrees not to disclose or communicate information about the Coach's practice, materials, or methods to any third party. Our signatures on this agreement indicate full understanding and agreement with the information outlined above.

Client

Signature_____

Signature_____

Date_____