

Open Door Solutions

COACHING • MENTORING • CONSULTING

FINANCIAL COACHING AGREEMENT

Welcome!

Coaching is one of the tools that people use to create an extraordinary personal and professional life. It is one of the most important investments you can make. The coaching policies, agreement and questions contained in this document are designed to support this profound work and provide a structure for our coaching relationship. Ultimately this foundation will enable you to understand the coaching process and maximize the value of your coaching experience.

Policies

Confidentiality - Confidentiality is integral to honoring the sacred trust of the client / coach relationship and all our work together is completely confidential. I will not reveal that you are my client without your prior permission. You are welcome to inform people that I am your coach and discuss the content of our sessions with anyone you wish.

Communication - Honest and open communication is necessary in the creation of a successful relationship. If you would like to share a success or discuss a pressing topic during non-coaching times, please do so via email or leave a voice mail message; I will reply as promptly as possible. If I ever say or do something that upsets you or doesn't feel right, please bring it to my attention so we can resolve it! I promise that we will work to strengthen the trust in our relationship so that it supports your growth.

Financial Coaching - I am trained as a financial coach. While our discussions may entail financial topics, they will be primarily educational with the end goal of your personal empowerment through enhanced financial knowledge. Our conversations may span both quantitative topics (cash flow, credit use, risk management) and qualitative topics (your money history, money scripts, money memories and other feelings pertaining to money.) Because all our learning styles and knowledge levels are different my expectation is that you will inform me when you have any questions or are uncertain about concepts.

If for some reason it becomes evident that certain financial planning services are necessary, I can refer you to a competent, reasonably priced, fee-only professional. If you have any existing professional relationships (investment, tax, legal, insurance, etc.) my intent is to work with them respectfully and collaboratively as needed. The ultimate decision will always rest with you. I will support you as a coach and a resource should you need specific financial planning services.

Time Management - In honor of our commitment to the coaching process, we will begin and end our conversations on time. If you arrive/call-in late for your session, it will end at its regularly scheduled time. If you arrive early in person or by phone, I may be in another coaching appointment; please check-in or call back in a minute or two.

Calendar - In our busy lives, each of us will occasionally need to move a session. If you need to reschedule, please do so no less than 24 hours in advance. If I need to reschedule our session, I will extend the same courtesy and give you as much advanced notice as possible. When rescheduling is

necessary I will work to find an alternate coaching time within the same week. If you miss a scheduled session without informing me at least 24 hours ahead of time, this will be considered a paid session and will not be rescheduled.

Fees – The fee for our work together is _____. This includes:

- _____
- _____
- _____
- Payments are due at the start of each session.

Our Relationship – While coaching is generally designed to be ongoing, some clients find that a couple of sessions meet their needs. To fully engage in the journey of coaching, I suggest a three-month commitment to allow us the necessary time to create an alliance and initiate powerful sustainable change in your life. Some of the sessions will be inspiring and some will be difficult. Committing to three months will ensure we can move collaboratively through the challenging periods to achieve your goals. You will ultimately decide how often we meet and the duration of the coaching relationship.

The coaching process depends on an honest and open relationship between coach and client. If the coaching is not working in the way that you desire, please let me know. Together we can build a relationship that works for you.

Completing Our Relationship - When you decide it is time to end our coaching relationship, please plan on meeting with me for a final “closing session.” This allows us time to fully honor the completion process by giving us time to capture your learning and strategize for what is next in your life.

I look forward to our journey!

My signature on this form indicates full understanding and agreement with the information outlined above. If there is anything in this form I do not understand, it is my responsibility to seek clarification prior to signing.

Signature

Date

Signature (If being seen as a couple)

Date