

Fern Alix LaRocca CFP® EA
www.wholeheartedway.com
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(415) 819-3065

Coaching Agreement

Client:

Welcome to **Whole-Hearted-Way!**

Coaching can enrich your life in many ways, primarily because you have decided to invest attention and energy in your own development. Together, we can work on action plans that will produce results and get you where you want to go because you set the goals. Coaching can help you take better decisions for yourself and your business, have a more balanced life, while also being much more productive.

My role is: to ask you to be your best, while I listen critically, challenge assumptions, ask probing questions, provide strategic and tactical planning guidance - all this without imposing outside ideas, systems or solutions on your own life design. I will make direct requests and give clear assignments.

As to your role: I trust that you will discuss openly those professional and personal issues, conflicts and obstacles that most significantly hinder you in achieving your life goals. Please attempt to focus on what is important, not merely urgent. The better and more specifically you prepare for our sessions, the more you will profit from them. When I give you written assignments, I would like to receive a copy of your responses. Your successes and highest priorities will always be on our agenda. I will regularly request your written feedback and evaluation of the coaching process.

Please use me fully: I am interested in everything that pertains to your progress While I would like to be a broad resource to you, please don't depend on me. You grant power to the coaching process; you are responsible for setting your own goals and achieving the results you desire.

I trust you to also communicate any uneasiness with any aspects of the coaching process to me directly and openly at any time. I will request your monthly verbal or written evaluation, in order to be entirely sure that we are progressing as desired. Following, you will also find a summary of the more formal aspects of our relationship.

This agreement between **Fern Alix LaRocca CFP® EA** and the client will begin with the first session and will continue for a minimum of one month. Both client and coach agree to give each other 30 days' notice to cancel further services.

When the coaching is delivered by telephone, the client initiates the calls, unless other arrangements are made. The hourly fee is **\$200.00** with the closing balance due at the last session. The discounts for longer term sessions are:

A) **6** one hour weekly sessions over 2 months are **\$1,200.00**.

B) **9** one hour weekly sessions over 3 months are **\$1,620.00** (A 10% discount off the regular value of \$1,800.)

C) **18** one hour sessions over 6 months are **\$3,060.00** (A 15% discount off the regular value of \$3,600.)

D) **36** sessions over 1 year are **\$5,760**. (A 20% discount off the regular value of \$7,200.)

A deposit of 50% of the fee will be paid by the client in advance for 18 and 36 sessions.

You can pay by PAYPAL at advfin1@yahoo.com

OR

Send your deposit and signed agreement to:
Fern Alix LaRocca CFP®
Whole-Hearted-Way
1135 Lincoln Dr.
Mountain View, CA
94040

Sessions are held by phone, Google Hangout, or Skype.

Other services that qualify for hourly billing include: Email-coaching; research or editing work commissioned by the client, group coaching, team building, travel etc. These services will only be invoiced when approved by client.

Cancellations received less than 24 hours in advance are subject to full hourly billing of the missed session (e.g., if sessions are usually 1 hour, the equivalent will be billed).

Whole-Hearted-Way commits to keeping all client information strictly confidential, in order to encourage candor and a genuine exchange of thoughts and feelings.

Although ***Whole-Hearted-Way*** is interested in adding value to as many professionals as possible, the client commits not to re-distribute any program materials provided by the coach without prior approval by the coach.

The coaching process is a unique *action learning* method; it is not therapy, nor does it confer legal advice. Financial advice is offered if the client requests it and when appropriate. With the client's agreement, the client will refer to other competent professional colleagues with whom the coach collaborates or to those chosen specific issues.

It is agreed that, in the event of a dispute between client and **Whole-Hearted-Way** involving either the terms of the agreement or the services or guidance offered by the coach, both parties agree to first seek the aid of a professional Mediator acceptable to both parties, before pursuing other options. A next step would be to submit to binding arbitration in accordance to the rules of the San Francisco Chapter of the American Arbitration Association. The arbitrator shall have the power to award reasonable attorneys' fees and costs to the prevailing party, in addition to such other relief as may be granted.

My work carries a full satisfaction guarantee. I look forward to working with you in an atmosphere of trust, mutual respect and accountability. Thank you, in advance, for your confidence and openness. I am fully committed to your success.

_____ Date
Whole-Hearted-Way
By Fern Alix LaRocca CFP® EA

By: _____ Client