AGREEMENT BETWEEN

Name of Coach, Coach and Name of Client, Client

Both parties agree upon the following conditions for performance:

1. Name of Coach will begin providing coaching services on: date

2. Time Commitment: You have a maximum of 6, 1-hour of coaching sessions. These sessions may be conducted in person or by phone. You are welcome to leave me messages via email or telephone should you wish to share information related to our coaching sessions, progress on action items, or other highlights. I am your success partner!

3. Coaching Services: Coaching--which is not advice, therapy or counseling--will address specific financial goals or general conditions/goals in your personal or professional life that may influence your financial well-being. Other coaching services may include: clarifying values, brainstorming, identifying plans of action, examining modes of operation, asking clarifying questions, making empowering requests, and holding you accountable for your actions. In the event that you need assistance beyond the scope of my abilities, a referral may be made.

In order to collect your feedback and help Tax-Aid improve our programs, I will conduct a survey at the beginning and end of our coaching engagement. A Tax-Aid staff member may also contact you to check in about how coaching is going or request to tape record one of your coaching sessions. This information will all be held confidential and will only be shared with Tax-Aid staff and Research Manager.

4. Duration: This agreement will be valid until the end of our 6-month coaching engagement. Tax-Aid will evaluate coaching services within the first 3-months of our agreement to make sure you are satisfied and to determine whether you would like to continue through the remainder of the year. You will also be asked you to report your credit score twice during our coaching engagement. If for any reason you find that satisfactory services are not provided, you may terminate services with a 14-day notice. Tax-Aid also reserves the right to terminate services with 14-days’ notice.

**5.** **Missed Sessions:** If you must change an appointment, please give at least 24-hours notice. If you miss or reschedule an appointment without giving 24-hours notice, you will forfeit that session/time. Please make all appointments/calls on time. If for any reason you must be late, please let me know ahead of time. If you miss two scheduled coaching sessions without notifying me ahead of time, your coaching engagement will be suspended. You will also be required to meet with me at least once every two months. If two months pass without meeting at least once, your coaching engagement will be suspended.

**6. Phone Sessions:** If you plan to have some or all of your coaching sessions by phone, it will be your responsibility to initiate the session calls on your scheduled date/time. I will be waiting for your call. Also, please note that if you coach by phone, you will need to be able to use email and internet comfortably and have easy access to an internet connection.

7. Confidentiality: I, Name of Coach, promise you that all information provided will be kept strictly confidential within the Tax-Aid staff. I value your willingness to be truthful and will respect the private nature of whatever information you share.

8. Preparation: Please come to each session prepared to participate fully.

9. Honesty: Be honest. As your coach, it is essential for me to be aware of any past or present experiences and/or ways of thinking that may influence your life now. More specifically, please let me know if you are currently in therapy. The more honest you are, the easier it will be for me to make sure you get the most out of your coaching experience.

10. Shared Responsibility: It is our shared responsibility to make coaching work for you. Lead the session. Ask for what you want. Let me know what is working or what is not working in our coaching partnership. In return, I ask your permission to be bold and forthright. My promise to you is to be unconditionally constructive. This is about you winning and creating balance, generating feelings of empowerment, and welcoming change.

Our signatures on this agreement indicate full compliance with the requests and the promises above and complete understanding of the services to be provided.

Client Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Coach Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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