

Coaching Engagement Agreement: Template

Client Name	
Fee \$ Agreement	
First Session Date/Time	
Number of Sessions & Duration	
Total Fee & Form of Payment	

The following criteria describe the boundaries of the _____ coaching partnership between [coach] and [client].

As a client, I _____, understand and agree that:

- Coaching Process Example:** _____ coaching is a process that is focused on _____. This is a _____ process that may involve _____.
- Client Responsibility Example:** I am fully responsible for my _____ during my coaching sessions, including my _____. I am aware that I can choose to discontinue coaching at any time and that coaching is not intended as medical advice.
- Legal liability example:** I agree to indemnify, defend, and hold my coach harmless from and against any and all liability and expenses in connection with claims for damages of any nature arising from coaching.
- Differentiating coaching example:** _____ coaching **is not** mental health counseling, treatment for substance abuse, or promoting expertise/advice. I understand that my coach is not functioning as a licensed mental health professional and coaching is not intended as a replacement for counseling, psychiatric interventions, treatment for mental illness, recovery from past abuse, professional medical advice, financial assistance, legal counsel, or other professional services.
- Release for mental health services example:** If I am currently seeking **mental health services** by a state licensed psychologist, social worker, therapist, or counselor, I will inform my coach of the nature of this relationship, as well as sign a consent form, should it be necessary to share my information with them.
- Advisability of coaching example:** If I am currently in therapy or otherwise under the care of a mental health professional, I will consult with him/her regarding the advisability of working with a _____ coach to ensure this individual is aware of my decision to proceed with the _____ coaching relationship.

7. **Personal responsibility example:** If necessary, I will seek professional advice for legal, medical, financial, business, spiritual or other matters. I also understand that all decisions in these areas are exclusively mine, and I acknowledge that my decisions and my actions regarding them are my responsibility.
8. **Process example:** Coaching can involve brainstorming, values clarification, the completion of written assignments, education, goal setting, identifying plans of action, accountability, making requests, agreements to change behavior, examining lifestyles, and questioning.
9. **Self-honesty expectation example:** Coaching is most effective when both parties are honest and straightforward in their communication.
10. **Process example:** _____ coaching will be an ongoing relationship that might take a number of months, although either party can terminate at any time. The sessions will be facilitated via _____
11. **Disclosure of topic sharing example:** I understand that certain topics may be **anonymously** shared with other life-coaching professionals for training or consultation purposes.
12. **Confidentiality example:** Coaching is a confidential relationship and the coach agrees to keep all information strictly confidential, except in those situations in which I provide my written consent, or if such confidentiality would violate the law (e.g., jeopardize the safety of the client or others). In these cases, your communications may be disclosed to appropriate state law enforcement authorities.
13. **Rescheduling process example:** If needed, I can reschedule my session by contacting my coach via _____ at least ____-hours prior to my scheduled sessions. Otherwise, I recognize this session will be counted toward the terms of my coaching agreement.
14. **Process expectation example:** I am responsible for _____ (calling, meeting with) my coach at the appointed time. If I have not called in five minutes of the scheduled time, my coach will call me. I will do my best to make all appointment/calls on time. If I know I will be late for any reason, I will let my coach know ahead of time.
15. **Cancellation of services example:** If at any time, I choose to cancel services payment may still be required, depending on need of cancellation and previously agreed upon parameters of termination.

I have read and agreed to the above terms of this engagement. {Signature process can be added in Quenza}.