

Date: **13 Jul 2021 10:43**

Coach: **Certified Positive Psychology Coach Kelly Miller**

Client: **Karyn Gray**



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# Client Intake Forms

## Coaching Engagement Agreement

I look forward to working with you. I am deeply committed to helping you create and achieve your vision for your personal and professional life. Together we will explore what you want and what your natural and most powerful way of achieving that is.

Coaching works by combining inner work with outward action. Inner work involves identifying and updating the core beliefs and habits currently creating your life experiences. The outer work involves creating the goals, processes and systems that support you in meeting your goals. Along the way, I offer you researched based theories, measurement and tools to enhance your journey.

Having a clear Coaching Agreement establishes a foundation for our work together.

Coaching services are not in any way to be construed as, or a replacement for, psychotherapy, legal counsel, or medical advice. You are responsible for creating your own decisions and results. In this way, you agree not to hold me, my company A Brighter Purpose, LLC or any company I am affiliated with, liable for any outcomes resulting directly or indirectly from the coaching process.

**As your coach, you can expect me to:**

1. Be a partner in bringing out the best, the deepest, and the truest in you
2. Provide safety, encouragement and support; an environment in which you can relax and explore
3. Respect the confidentiality of the agreements we make
4. Expand your view of what is possible and promote discovery of new insights
5. Give you input, straight feedback and operate as a sounding board
6. Listen carefully to what you say and ask questions that increase awareness
7. Be an on-going resource for you in accomplishing your intentions

**I expect that you, as my client will:**

1. Cultivate a core honesty with yourself
2. Commit yourself to intentions that are truly meaningful and significant to you
3. Keep me honestly informed as to what is and is not working for you
4. Take ownership for your progress and your accomplishments
5. Take financial responsibility for your coaching time. If you are unable to give 1 day notice for a missed appointment, you may receive your coaching via email exchange.

As your coach I agree that all information you provide will be kept strictly confidential. I respect your willingness to be truthful, and I will treat this information as a special confidence. Although there are no guarantees on the outcomes from coaching, most people report significant progress on their goals. Nevertheless, each party agrees to indemnify, defend, and hold

harmless the other party from and against any and all liability and expenses in connection with claims for damages of any nature arising from such party's performance or failure to perform in obligations hereunder.

My philosophy is that you have the capacity and the inner resources to approach your current life situation in a way that transforms your ability to have more of what you want and with considerably less effort.

For our sessions, I will call you unless other arrangements have been made. All sessions are subject to a 24-hour cancellation policy. So with prior arrangement, a missed appointment can be made up with email coaching.

On occasion, you may have an urgent question, request for feedback or want a confidential response to some situation where you don't want to wait for your next call. This is a "just in time coaching" where you can use email to get a timely response. In an emergency, you could call me directly.

With regard to payments, we agree on a fee of \$100 per one-hour session. The Discovery Session is 2 hours long at a discounted rate of \$250. Most clients choose to securely store a credit card on file. There are no contracts or requirements to pay for a group of sessions up front. You're are billed in advance for your appointment to hold the appointment.

Again, please honor the 24-hour cancellation policy since there are only a limited amount of slots open per week. Last minute cancellations prevent other clients from taking the reserved time slot and are therefore billed as a late cancel and are required to pay the cost of the session.

Achieving the life of your break through goals is a process. I commit to the price previously agreed upon for the duration of our coaching time and you

commit to staying open and connected to the process. We both agree to communicate about the natural flow of our work together.

Most clients find that in time they spread their coaching from weekly, to bi-weekly, to monthly and then booster sessions to track their progress. This natural progression is highly desired in coaching in that with more coaching you should feel greater positivity, control and autonomy around meeting your goals.

My practice fills by referrals. As you experience powerful changes in your life and career/business, I would appreciate any recommendations of my services to interested friends and colleagues that can benefit from these tools and services.

By signing this document, you attest to having had read this document in its entirety and agree to the above. You also agree to be charged in advance for your coaching session to reserve your appointment.

## **Contract to Sign**



Name:

Fee \$ Agreement:

First Session Date/Time:

Number of Sessions & Duration:

Total Fee & Form of Payment:

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

As a client, I \_\_\_\_\_, understand and agree that:

1. Positive psychology coaching is a process that is focused on my current and future priority needs, interests, and goals (e.g., short and long-term purposes). This is a comprehensive, holistic process that may involve multiple aspects of my personal growth including: relationships, career,

spirituality, values, finances, education, recreation, health, communication, transitions, and decision-making.

2. I am fully responsible for my wellbeing during my coaching sessions, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time and that coaching is not intended as medical advice.
3. 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.
4. Positive psychology 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.
5. 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.
6. 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 life coach to ensure this individual is aware of my decision to proceed with the life coaching relationship.
7. 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. 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. Coaching is most effective when both parties are honest and straightforward in their communication.

10. Positive psychology 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 either in person, virtual meeting, or the telephone.

11. I understand that certain topics may be **anonymously** shared with other coaching professionals for training or consultation purposes.

12. 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. If needed, I can reschedule my session by contacting my coach via e-mail or phone at least 24-hours prior to my scheduled sessions. Otherwise, I recognize this session will be counted toward the terms of my coaching agreement.

14. I am responsible for calling 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.

I have read and agreed to the above terms of this engagement.

Client Signature

