

# PERSONAL COACHING AGREEMENT

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Thank you for making Jami Johns Coaching part of your success plan. We look forward to serving your needs! To help guide our relationship, we ask that you review the information below.

## SCHEDULING APPOINTMENTS

To schedule an appointment, you can email if you need something not offered in Calendly to see if it is an option or book online through the Calendly link shared via email. Appointments can be conducted in person or by video conference as co-designed by the coach and client. Both coach and client agree to value the time of the other, so we ask that you honor our scheduled appointment time. To honor this, a minimum of 24 hours' notice is given to either party for cancellation of a session, not considering a legitimate emergency.

## SPOUSAL PARTICIPATION

If you are married, it is recommended that both spouses participate and commit to all scheduled coaching sessions. If this is not possible, please inform your coach so they can plan accordingly.

## REFUND POLICY

We do not offer refunds for our coaching services as we are a fee-for-time service. We promise that you will get out of the coaching session what you put into it.

### COACHING SERVICES

We assume the responsibility of understanding and evaluating your current needs, goals, and resources in order to develop a strategy to meet your objectives. However, in order to make your plan work, we expect that you will come prepared to take the steps necessary to succeed, take full responsibility for your plan and its implementation, and contact us when you need additional advice and direction.

### PAPERWORK

You are asked to complete preliminary paperwork to better prepare your coach. We ask that these forms be filled out to the best of your knowledge and ability before your appointment. You assume all responsibility for providing accurate and complete materials, documentation, and facts upon which our coaching may be based.

### CONFIDENTIALITY POLICY

We will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to us or we generate. We will reveal such matters only upon receipt of written authorization and clear, verifiable instructions from you telling us exactly what we may reveal.

### DISCLAIMER

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. We cannot render legal, accounting, or other professional advice. Since your situation is fact dependent, you must additionally seek the services of an appropriate licensed legal, accounting, or investment service.