

Personal Coaching Agreement

I look forward to serving your financial planning needs as your fitness coach. To help guide our relationship, please review the information below.

SCHEDULING APPOINTMENTS

To schedule an appointment, please call (760) 576-HOPE. I understand that your time and resources are extremely valuable, and ask that you honor your scheduled appointment time. If you need to reschedule, just let me know in advance.

Appointments can be conducted in the office at 6154 Innovation Way, Carlsbad CA 92009, over the phone, or via video conference.

SPOUSAL PARTICIPATION

If you are married, both spouses must participate and commit to all scheduled coaching sessions. If your spouse is not available for an appointment, we will reschedule.

REFUND POLICY

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

COACHING SERVICES

I 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, I expect that you will come prepared to take the steps necessary to succeed, take full responsibility for your plan and its implementation, and contact me when you need additional advice and direction.

PAPERWORK

You will be asked to complete preliminary paperwork. Please fill these out to the very best of your knowledge and ability prior to your scheduled appointment. You assume all responsibility for providing accurate and complete materials, documentation, and facts upon which our coaching session may be based.

RESCHEDULING APPOINTMENTS

If you need to reschedule your session for any reason, please give us at least 24-hour advance notice.

CONFIDENTIALITY POLICY

I will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to me.

DISCLAIMER

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. I am not authorized to 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.