FINANCIAL COACHING AGREEMENT

Thank you for choosing Sign Post Relationship Solutions for your financial coaching needs. We look forward to serving you! To help guide our relationship, we ask that you review the information below.

SCHEDULING APPOINTMENTS

To schedule an appointment, please contact our office. We understand that your time and resources are extremely valuable, so we ask that you honor your scheduled appointment time. If you need to reschedule, just let us know in advance. Appointments will be conducted 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.

FEE SCHEDULE - All fees are paid in advance.

Initial Conversation – No Charge (max of 15 minutes)

After the initial conversation, if you decide to move forward with our financial coaching services the fees are as follows:

Initial Coaching session - $250.00

Additional sessions are offered in packages:

3 sessions - $650.00

5 sessions - $1,000.00

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.

RESCHEDULING APPOINTMENTS

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

Financial Coaching Agreement (Con't)

PAPERWORK

You are asked to complete preliminary paperwork to better prepare your coach. We ask that these forms be filled 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 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 a 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 are 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.

We, the undersigned, agree to abide by the terms of the Financial Coaching Agreement.

_____	_____	_____
Print Name	Signature	Date
_____	_____	_____
Print Name	Signature	Date

Reviewed by:

_____	_____
Dr. Randy Lewis Financial Coach	Date