



Hello!

Such a big and warm welcome to you! I am truly thrilled and honored that we are standing here together at the threshold of your big, bold audacious life!

I will assume that you are the expert on your life, that you have the answers. My questions will always be direct and deep to help you dig deeper into creating that life you are longing for. I will ask you to take action when you have chosen an objective, and I will ask you how you want to be held accountable for the actions that you commit to. We will work as a team to create a coaching alliance that will help you stay focused and move forward toward your chosen targets.

You have several sections attached to this letter:

1. Personal Info Sheet
2. Policies & Procedures
3. Agreement
4. Coachability Index
5. Coaching Prep Form

Please read this document thoroughly. Complete the Personal Information Sheet (section 1), sign the Coaching Agreement (section 3) and send payment to: _____ as soon as possible to confirm that coaching will proceed without delay.

I am very much looking forward to working with you! If you have any questions or concerns, please contact me. Once again, a warm welcome to coaching! I am confident that we can design a powerful relationship that will provide the structure and support to keep you moving forward.

I admire your commitment to yourself and to your future. I'll be talking to you soon!

→ Section 1. Personal Information Sheet

All information is completely confidential and will be held as such.

Full Name

Mailing Address:

Tel:

Home:

Mobile:

Preferred Email:

Work Information:	Occupation:
Employment Name & Address	
Date of birth:	
Marital Status:	☐ single ☐ in partnership ☐ married ☐ divorced ☐ widowed ☐ Other: _____

Primary partner's name and date of birth (if applicable);, or important people in your life:

Child/children's name(s) and date(s) of birth:

Pets:

→ Section 2. Policies and Procedures

Commitment – You are hiring me to be your coach because you want to make significant changes in your life. These changes will sometimes happen fast and sometimes not. However, when the going gets tough, I do ask that we stay in collaboration and work through to the other side. As your coach you have my word that I am 100% committed to you being powerful, fulfilled and having the life you want.

If during the our time together, there occurs any reason to change our agreement, my request is that we design a period during which we will look at the issue(s) and create a mutual resolution that honors client, coach and the coaching alliance. Please discuss your concerns with me openly. My goal is to support you in the way you deem best. Upon completion of commitment, we can discuss options at that time. No matter what time frame you are committing to, **I request one month notice with a completion session as the final meeting.**

Refunds - **Please Note: Coaching sessions paid for and unused are not eligible for refunds.** They are held in your account indefinitely and may be used either by you or a third party you authorize **in writing** toward any of the services I offer.

Logistics – Our coaching sessions will be via telephone or we may also choose to use my Zoom meeting ID: <https://zoom.us/my/radicalwisdom>

I ask that my clients initiate the call **by logging into Zoom** at the agreed appointment time. Please be on time. If you call early, I may be completing a session with another client and you may have to wait a few minutes until I finish with them, maybe take a bio break and then admit you to the room. If you are late, your appointment will be shortened accordingly. If I am late, I will extend your session accordingly with your agreement.

Fees – I am offering you a special VIP plan for \$_____ a month which includes up to _____ hrs coaching sessions, a CVI assessment profile and unlimited email. **This agreement automatically renews month to month however fees are subject to change with one month written notice via email.**

Invoicing - Monthly coaching fees will be invoiced on the 20th of every month and your payment is due **BEFORE** the end of that month in payment of the following month. ***Coaching hours not used may not accumulate to any of the following months.***

Changes – Rescheduling is easy with advance notice. If you must cancel or reschedule, please give me at least 72-hrs. notice during business hours. I will do the same for you if I need to reschedule. If appointments are missed (no notice, no emergency), they will not be rescheduled and you or your company will be responsible for payment for the missed time.

In between sessions – Call, email me or text me (_____) in between scheduled calls if you need a sounding board, have an issue or want to share a success with me. I invite you to use email,

texting and voicemail as frequently as you like and rely on that to strengthen and deepen the coaching alliance. I enjoy including this contact in my fee. However, any email that takes over three minutes for me to respond to, will require a session to be scheduled. Any phone call over five minutes will require a session to be scheduled.

If you need a reply, please indicate that in your voice mail or email. Whenever possible, I will respond within 48 hours unless I am out of town or it's a weekend.

Come to each session fully prepared – as if the life and success that you desire depended on it. At the end of this package is a coaching prep form that will help you organize your thoughts for each call. Determine the agenda/topic that would be of most value to you. You may choose to email the form prior to each call. This is optional.

Bottom-lining – We all have lots of places to tell our “stories.” In coaching it is best to tell the essence of a point rather than engaging in long descriptive stories. At times I may intrude or interrupt a story and go to the heart of what you want. I do this in service of your bigger agenda in life. I'm far more concerned with you getting what you want than with me being “polite.”

My Responsibility / Your Responsibility – I assume you are creative, resourceful, and whole – nothing broken that needs to be fixed. I can serve as a catalyst for you to both tap your innate wisdom AND develop skills that you desire. I'll offer different perspectives, brainstorm with you and ask lots of questions. Most of the time, you'll leave each session with “fieldwork” assignments. My role is to be 100% in your corner working with you to strategize your success and fulfillment. I **ask that you be completely honest with me.** Let me know if there is something that you want but are not getting from the coaching. Don't “hope” that I will figure out what you want. Ask! Tell! Insist on getting your money's worth!

Accountability – One of the keys to coaching is the structure it provides for accountability. Telling your coach what you intend to do and knowing that your coach will follow up is often a powerful tool in dealing with limiting fear, procrastination, etc. I assume most adults operate or wish to operate with “self- accountability.” We will design the way that you'd like to be held accountable.

Confidentiality – The coaching relationship is confidential. During the Discovery Session, we will design the ground rules for our coaching relationship and its confidentiality. The coaching service is absolutely confidential except in the following instances:

- You share information which indicates you are doing direct harm to the organization
- You share information which I am ethically or legally obliged to disclose
- The contract with the organization requires that I provide progress reports – you will be made aware of the nature of this prior to starting the coaching relationship

I reserve the right to occasionally discuss my work with my own coach or carefully selected Advisors, to support my own professional development. I will do this in a way that absolutely protects my client's identity and reveals the bare minimum of what my client has shared with me.

It is also important to note: **I abide by the Ethics & Regulation as outlined by [the International Coach Federation](#)**. This means also abiding by our agreement as outlined here.

Problems - Being human, it is conceivable that I may say or do something that upsets you or does not feel right. Or, you may simply want more or less of something in our coaching relationship. If this occurs, please bring it up immediately. I promise to make you right for doing so and to do what is necessary to have you satisfied. Above all, I want to make our relationship a safe place where you are fully supported and feel you can bring anything to our sessions that will serve you.

→ **Section 3. Coaching Agreement**

Please print, sign and return this agreement to your coach along with the Personal Information Sheet & Coachability Index ALONG WITH YOUR PAYMENT.

I agree to serve as your coach to help you achieve mutually agreed upon targets, which may include, but are not limited to:

- Personal and/or professional clarity
- Increased physical health
- Creating optimum personal or professional relationships
- Developing increased self-sufficiency, self-respect and self-awareness
- As your coach I cannot guarantee results. I can tell you that you will create different results just by having the courage to experiment with your approaches to life.
- During the time we spend together in our coaching, I will devote my time, thought and energy to you exclusively. In between our sessions I may not be readily available as I will be attending to others, including myself. I will do my best to return your call or e-mail within 24-48 hours Monday through Thursday during business hours of 10 am to 5 pm ET.
- I will maintain confidentiality regarding information you choose to share with me.
- I am not trained to provide psychotherapy. If any issues come up for you that should be handled by a licensed therapist or physician, we can stop coaching while you attend to these. Or, if coaching and therapy can co-exist for you (you can still move forward toward your targets), we can continue.

Client:

I ask that you agree to the following (in the statements below, "I" refers to you, the client):

- When the going gets tough, I will stay in collaboration with my coach
- I will see that I have paid in full prior to any month of coaching (for month to month) and understand that coaching will not proceed without payment
- I understand that my coach is not responsible or liable for actions or inactions as a direct or indirect result of our coaching sessions
- I will give at least 72-hrs. of notice during the business week if I need to reschedule an appointment. I understand that the appointment is forfeit if I cancel without notice or miss the appointment without rescheduling
- I am responsible for seeing that I have received all the coaching due to me
- I will take risks and embrace (or at least learn from) failure

- I will be honest with you about how to coach me and make direct requests for what I need
- I understand that the power of the coaching relationship must be granted by me. I commit to making this relationship powerful. If the coaching isn't producing the results I want, I will communicate this as soon as I am aware of it
- I understand that there are no refunds however should our arrangement not be suitable to either of us, I can use these sessions at a later date or transfer them to someone else
- I understand that ALL forms, questionnaires, documents, in any format shared with me by my coach, is the proprietary property of Tammy Anne Gelfand as a result of the entirety of her lengthy career and experience and that I may not share or distribute any of these without her express written permission
- I will come to each session with an agenda and ready to be coached
- I grant permission to Annie Gelfand to identify me as a client or former client of her coaching practice and publish any testimonial I give her to be used for marketing purposes. No content or details of our coaching will be shared unless there is a request from the legal system (note: the coach-client relationship is not privileged and therefore not protected in the court system)
- I will return this signed agreement to my coach prior to our first coaching session
- This agreement will be governed by the Laws of Ontario, Canada

→ **My signature on this agreement indicates compliance with the statements above, understanding of the services to be provided, and understanding of my responsibilities in this relationship. This is not a legal agreement. This is a commitment to the quality of my life.**

→ _____
 Client's Printed Name Client's Signature Date

→ Section 4. Coachability Index

CLIENT INSTRUCTIONS: Please fill this out and return your responses to me prior to our first session. Circle the number below that comes closest to representing how true each statement is for you right now. In order for coaching to serve you well, you need to be at a place in life where you are coachable. This assessment helps your coach, and you, discover how coachable you are at this time.

Rating Scale: 1 = Less True ... 5 = More true

1 2 3 4 5 I can be relied upon to be on time for scheduled calls and appointments and to call the coach and reschedule when needed.

1 2 3 4 5 I will come to our sessions with an agenda or an idea about how I would like to use our time together.

1 2 3 4 5 I am fully willing to do the work and let the coach do the coaching

1 2 3 4 5 I'll give my coach the benefit of the doubt and "try on" new behaviors or different ways of thinking.

1 2 3 4 5 I will speak straight (tell the whole truth) to my coach.

1 2 3 4 5 I am willing and able to stop or change any self-defeating behaviors that limit my success.

1 2 3 4 5 I can financially afford coaching without going into debt.

1 2 3 4 5 I have a healthy zest for life and am excited about setting new targets and attaining them.

1 2 3 4 5 I have no dependency on substances that alter my ability to think clearly and act responsibly *at all times*, or I am in recovery and receiving the support I need. *

***Please note:** *If your family or friends have expressed concern or requested that you stop drinking alcohol, using illegal substances, or abusing prescription medications, you may have a dependency problem. If you suspect you may have a problem, or if you can't get through the day without using*

the above substances, you will need to get treatment and support before coaching can be the right process for you.

→ **Section 5. Coaching Preparation Questions**

To be completed and sent to your coach at least one day prior to your coaching session.

Date:

In order to make the best use of your coaching session, please answer these questions in advance of each of our coaching appointments. Please ensure your coach receives your responses at least 24 hours before each session. Use as many or few words as you like!

1. What were my accomplishments since our last session?

2. What were the main things I would have liked to have achieved and didn't?

3. What challenges or issues am I facing right now?

4. What opportunities are available to me right now?

5. I want to use my coach during the session to:

6. What was the most useful aspect of our last session and why?

7. What would you like to radically change in your coaching? What personal (or professional) growth edge are you asking for right now? Be specific and state the FEELING you will feel when you have it. Make it PERSONAL. Focus on the breakthrough change as it impacts YOU, not others.

NOTES: