



Julie Lusk, M.Ed. ☎ 513.576.6662 ☎ 5678 Willnean Dr. ☎ Milford, OH 45150 ☎ WholesomeResources.com

Personal Coaching with Julie Lusk

CLIENT POLICIES AND PROCEDURES

Welcome!

I am very excited to be working with you as your personal coach. I am absolutely convinced that each of us has the innate power to create and live the life we dream of living. As your personal coach, I will be with you at every step to provide focus, structure, and support so that you WILL achieve your personal and/or career goals.

Understanding: Coaching is NOT psychotherapy, nor a substitute for psychotherapy. It does not deal with the same issues and is not covered (nor should it be) by any health insurance policies. There are many invaluable interventions for clinical depression, substance abuse, and other significant psychological difficulties but personal coaching is not among them. Individuals experiencing these kinds of problems should seek help from qualified, professional psychotherapists. Coaching is designed to give focus, structure, and support to achieving life and career goals. By signing this agreement, you understand that, although I am trained in counseling, I do not practice therapeutic counseling with my coaching clients. If issues arise that are best dealt with in a therapeutic context, I will make a referral to an appropriately trained professional.

Confidentiality: Although not a therapeutic relationship, our discussions and any related material are between us. I will not discuss anything we have talked about nor release any information to anyone without your informed, written consent or unless I am required to do so by law. Exceptions to confidentiality include information about intent to seriously harm an individual, child abuse, and elder abuse. Coaching records may be able to be subpoenaed. Some means of wireless communication (e.g., wireless telephones and email) may not be secure from eavesdropping, so if you agree to their use you are indicating your agreement to utilize a communication medium that may not be entirely confidential.

Indemnity: 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 and its agents, officers, and employees from and against any and all liability, expense, including defense costs and legal fees incurred in connection with claims for damages of any nature whatsoever including but not limited to, bodily injury, death, personal injury, financial or business losses, or property damage arising from such party's performance or failure to perform in obligations hereunder.

Call Procedure: Please call me at 513-576-6662 at our appointed time (online sessions and communication by email can also be arranged). If I will be at any other number, I will notify you in advance and give you another number to reach me. If you get my voice mail at my regular number, please hang up, and call again in about two minutes. My fax number is 513-576-1087. I am a very devout - at least twice a day -- email checker. Email me at: Julie@WholesomeResources.com.

Call Arrangement: Our agreement includes one call per week for approximately 30 to 45-minutes or a similar time commitment by email or Instant Messenger. I prefer to set a regular schedule in that it will help you to focus your attention on our work together. On the "Client Intake" form, you will have an opportunity to list the days and times that work well for you. We'll find a regular time that is convenient for both of us. *Please understand that missed sessions can't be made up.* If you do need to reschedule an appointment (and it is not because of an emergency or sudden illness) I would appreciate 24-hours notice and I will do the same for you. If a holiday falls on our regular session day, we'll move our appointment to a day before or after (this will be by mutual agreement). We'll handle illness or emergencies on a case-by-case basis.

Extra Time: I do not bill for any extra time that you reasonably need from me. You may want my advice, have a problem, or can't wait to share a success between our regularly scheduled sessions. Please don't hesitate to call or email me under any of these circumstances. Call me and if you leave a voice mail, clearly state if you want a call back from me. By entering into a personal coaching relationship with me, you understand that I am on your side and want very much to be helpful to you

Fees: The fee is \$65 per 30 to 45 minute session. There is a 10% discount if payment is made in advance for 4 or more sessions. Payment is due prior to our first session. The Client Intake Form notes that I accept personal checks as well as Visa, Master Card, and American Express charges through Paypal.

At the conclusion of our agreed time commitment, you may renew if you desire. Monthly renewals are payable on the same day that we begin additional sessions. I will send you an email request for payment through Paypal that can then be charged to your Visa, Mastercard, Discover, American Express or Paypal account. Late payments incur bad karma, unless we've made prior arrangements.

PLEASE SIGN, DATE, AND RETURN THIS FORM TO ME BY FAX (513-576-1087) OR E-MAIL to Julie@WholesomeResources.com

Client Signature: _____ Date: _____

I agree to the following terms of involvement (please circle):

- Single Session – Pay as you go

- Multiple Session Agreement – Get 10% discount for 4 or more sessions when paid in advance.
_____ Initial number of sessions desired (this option is renewable)

Sincerely,
Julie Lusk

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