



Ryan Helton, MSC, Licensed Professional Counselor
Mastering ME LLC, Tax ID#82-1435784
5505 W Chandler Blvd, Suite 9, Chandler, AZ 85226
480-712-8733, ryan@masteringme.org, www.masteringme.org

COACHING AGREEMENT/CONTRACT

Welcome to Mastering ME LLC, a personal development practice, where we offer counseling, coaching, consulting/training, and early childhood education/tutoring services. We are honored to have you here. Clients seek coaching services for a variety of reasons, and it can sometimes be an intimidating and overwhelming process. We look forward to collaborating with you and supporting you on your journey of “Mastering ME” so you can serve this world at the highest level!

This document includes information about your rights and expectations as a client and is intended to assist you in making an informed decision as you begin your coaching journey. Because it is your responsibility to choose a Coach and an approach to coaching that is most appropriate for your needs, you will find information regarding our practice, background, services, expectations, and policies. If you ever have any questions about this information, please ask.

This document constitutes an understanding of, and a contractual agreement between, you (the “Client”), and Ryan Helton, MSC, LPC (the “Coach”). It is your responsibility to read the Coaching Agreement carefully and raise any questions and/or concerns that you may have before you sign it.

Key Definitions

- *Coaching* – A voluntary change process that involves a “Coach” partnering/engaging with, and facilitating change for a “Client” in a thought-provoking and creative process that inspires the Client to maximize his or her personal and professional potential.
- *Coach* - A type of wellness professional who helps people make progress in general or specific areas of their lives to attain greater fulfillment and performance.
- *Client(s)* - The individual (or team/group), who voluntarily consents to coaching services, as outlined in this “Coaching Agreement”.
- *Coach-Client Relationship* - a professional relationship that is established by the Coach and the Client(s) under an agreement or a contract that defines the goals, responsibilities, and expectations of each party.

About “Coach” Ryan Helton, MSC, LPC

Ryan Helton’s desire to help others began early in his life while experiencing his own personal struggles. These early life struggles stirred his desire to begin mastering his own life experience (thoughts/emotions/behaviors/relationships/etc.), and to help others learn to master their own health and life experiences. Ryan’s education and mastery has been gained informally through life experiences and ongoing learning, and formally, through education, work training and experience. Ryan is a licensed professional counselor who has in depth knowledge and experience working with those struggling with formally recognized mental health disorders. Ryan will help educate you on the differences between mental health disorders (with diagnoses) and other general mental/behavioral/relationships struggles (without necessarily diagnosing), while always recommending appropriate levels of care (provider-types and services).

- *Educational Experience:*
 - Bachelor of Science in Human Development (Concentration in Child Development) from Arizona State University
 - Master of Science in Counseling (MSC) from CACREP-Accredited (highest level of accreditation for counseling programs) University of Phoenix

- **Professional Training & Experience:**

- NotMYkid- substance abuse program manager and motivational speaker for youth
- St. Joseph's Hospital- Wake Up Youth Program- court-ordered substance abuse education
- University of Phoenix- Senior Advisor & Manager- provide education and career counseling
- Chrysalis Domestic Violence Shelter- provide counseling and support to victims of domestic violence
- Southwest Behavioral Health- Licensed Associate Counselor- provide counseling services to individuals and families (provided school-based counseling services to Chandler Unified School District)
- Mastering ME LLC- Licensed Professional Counseling Services/Coaching Services/Consulting Services (including, provide contracted trainings to Chandler Unified School District Counseling Department)

Description of Coaching Services

Mastering ME LLC offers coaching, psychoeducation/training, consultation, and education/tutoring services to help individual adults, minors, and families in the areas of: health (physical/mental/emotional/spiritual), relationships (romantic, family, and beyond), and general life purpose (personally, professionally, occupationally, etc.). Examples of issues we may cover, include grief/loss, anxiety/fear, family concerns, adjustment to life changes, existential crises, self-worth, parenting, work-life balance, stress management, general and specific goal attainment, etc.

The services provided by Ryan Helton are "Coaching" and will be designed jointly with you, and tailored for you, the Client. A general life "Coach" is a type of wellness professional who helps people make progress in general or specific areas in their lives to attain greater fulfillment. Life coaches aid clients in improving everything from their health, relationships, careers, and day-to-day lives, depending on your needs and depending on the expertise of the coach. Life coaches help you clarify your goals, identify obstacles holding you back, and come up with strategies for overcoming obstacles. In creating these strategies, life coaches target your unique skills and gifts. By helping you to make the most of your strengths, life coaches provide the support you need to achieve long-lasting change.

The focus of coaching is growth/development and implementation of strategies to reach client-identified goals which are intended to enhance personal fulfillment and performance. Coaching utilizes personal strategic planning, values clarification, brainstorming, motivational interviewing, use of CBT mapping, and other appropriate teaching methods and models. NOTE: Deciding how to handle these issues and incorporate coaching into those areas is exclusively your responsibility.

*Services are provided in person, via videoconferencing, or telephone, depending on expressed needs and/or limitations of Coach and Client.

Coaching Process, Rights, and Scheduling

Your coaching will begin with one or more sessions devoted to an initial assessment so that your coach can get a good understanding of the presenting concerns, your background, and any other factors that may be relevant. When the initial assessment process is complete, you and your coach will discuss ways to approach the concern(s) that have brought you into coaching and develop your goals for "Mastering ME". You have the right and the obligation to participate in the directional focus of coaching and in the development and periodic review and revision of your goals. You also have the right to refuse any recommended areas of need for growth or to withdraw from coaching.

Scheduling sessions is the Client's responsibility. To schedule, you can contact your Coach via telephone (text, if agreed by both parties), email, or schedule in person at the end of your sessions. Upon scheduling a coaching session, you will receive an appointment confirmation via text or email (unless you opt out of appointment reminders). Canceling sessions can be done via telephone call, voicemail, text, or email, and must be done 24 hours or more prior to scheduled coaching session. If Client cancels session within 24 hours of scheduled session, then this would be classified as a 'Late Canceled' Session. Missing a coaching session, without communication with Coach will be classified as a 'No-Show'. Client will be subject to the Late Cancellation/No-Show policy in these situations. See 'Fee Agreement' to understand the cancellation policy and fees.

**Unless arrangements between Coach and Client are made, if Client fails to schedule an appointment and more than 30 days passes without any communication from Client, your Coach will administratively close out of coaching services at that time. Coaching will be considered 'Terminated'.*

Stages of Coaching Services

(BEGINNING: Session ~1-3)

Initial Assessment - An initial assessment (qualitative interview/inventories/questionnaires/assessments) will be gathered and used to provide valuable information to guide and focus our coaching relationship. An assessment generates a baseline that provides us insight, increases awareness of patterns of behaviors, identifies problems, and brings clarity to the goals you want to target. Beyond the "Initial Assessment", understand that assessment is an ongoing process throughout coaching and serves as feedback to the goals being worked on.

Diagnosis of Problem Areas (*not to be confused with issuing you a formal mental health diagnosis*) - This is where we identify the problematic patterns (thinking/emotionally/behaviorally) and isolate out some of the problems that you want to reduce/eliminate and improve.

Goal Formation - Upon completing the initial assessment and diagnosing of your problems, you identify target goals to work on, including outcomes you would like, habits and patterns you are seeking to create. We break down in SMART Goal format:

- Specific (Simple, Sensible, Significant)
- Measurable (Meaningful, Motivating)
- Achievable (Agreed, Attainable)
- Relevant (Reasonable, Realistic, Resourced, and Results-Based)
- Time-Bound (Time-sensitive)

(MIDDLE: ~3 and beyond; # of sessions different for everyone and dependent on many factors Coach/Client will discuss)

Active Coaching – Active Coaching is the "work" being done in your coaching session, which includes processing of successes/progress and ongoing struggles, pattern recognition (CBT mapping), and skill development/training. The frequency of the Active Coaching phase can be anywhere from weekly to every three weeks.

Maintenance – The Maintenance phase includes less frequent coaching sessions where the Client is largely doing the work independently, outside of regular coaching sessions, and comes in for coaching sessions to stay accountable to self/goals, share successes/struggles, and to receiving "tune up" coaching, as needed. The frequency of the Maintenance phase of coaching would be anywhere from one to three months.

(END: Last 2-3 Sessions)

Termination/Closure – The Termination/Closure phase of coaching is about recapping and summarizing the growth made through the coaching relationship. Coach and Client reflect on the baseline starting point, and then progress made through the coaching process. The Coach is more like a cheerleader at this phase, celebrating the growth and progress, while also discussing the continued areas that the Client wants to grow moving forward, outside of continuing formal Coaching. Termination marks the end of the coaching process, coaching agreement, and the end of the coach-client relationship. *Please note that a Client can return for services at any point in time. If the relationship, the process, and the progress has been a helpful one, we like to say, "You have a coach for life!"

Differences & Similarities Between Coaching and Psychotherapy

In addition to being a coach, Ryan is also a licensed professional counselor in Arizona, with knowledge, training, and experience in diagnosing and treating mental health disorders. While there are many similarities between role and function of a Coach and a Licensed Counselor, there are also important and distinct differences that are important for you to understand.

As defined by Arizona State Law and Arizona Board of Behavioral Health, the practice of "professional counseling" means the professional application of mental health, psychological and human development theories, principles and techniques to: (a) Facilitate human development and adjustment throughout the human life span. (b) Assess and facilitate career development. (c) Treat interpersonal relationship issues and nervous, mental and emotional disorders

that are cognitive, affective or behavioral. (d) Manage symptoms of mental illness. (e) Assess, appraise, evaluate, diagnose and treat individuals, couples, families and groups through the use of psychotherapy.

Coaching is *different* from psychotherapy — it neither is, nor purports to be, a substitute for psychotherapy. The primary differences between coaching and counseling (“psychotherapy”) are that psychotherapy is a healthcare/medical service that usually involves a health/medical diagnosis from a state-licensed mental health professional. This is not true for coaching. You will not receive a medical/health diagnosis. Licensed mental health providers are regulated by state law and by a state board of behavioral health and are required to practice in accordance with these laws and ethics. “Coaching” is not a profession regulated by state law. Although a code of ethics is adopted, a code of ethics is not required to be followed. Counseling will result in formal medical records, subject to rules of HIPPA, while coaching will not include medical records.

Some of the similarities between coaching and counseling include: facilitating human development and adjustment throughout the human life span, assessing and facilitating career development, coaching interpersonal relationship issues and mental/emotional problems that are cognitive, affective or behavioral, managing symptoms of problems experiences, and helping individuals, couples, families, and groups. Both coaching and psychotherapy utilize knowledge of human behavior, motivation, behavioral change and interactive techniques to facilitate the change process.

Professional Counseling vs. Coaching		
	Professional Counseling ("Psychotherapy")	Coaching
Role	<ul style="list-style-type: none"> • Mental health provider who helps assess and facilitate human development and adjustment throughout the lifespan. • Clinically assess, diagnose, and treat client(s) according to Diagnostic Statistical Manual and/or International Classification of Diseases Manual 	<ul style="list-style-type: none"> • Trained/experienced coach who helps assess and facilitate human development and adjustment throughout the lifespan. • Provide (non-clinical) assessment, diagnosis of problems/solutions, and facilitate change process. • Partner with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. <p>*If needed, refer out for clinical professional services</p>
Diagnosis and Treatment	<ul style="list-style-type: none"> • Clinical Assessment, Diagnosis • Most subscribe to “BioPsychoSocial Model” that recognizes the influence and interaction between various personal factors, including: <ul style="list-style-type: none"> • biological/physiological • psychological/cognitive/emotional • behavioral • social/environmental 	<ul style="list-style-type: none"> • Does <i>NOT</i> provide medical diagnosis • Subscribes to “BioPsychoSocial Model” that recognizes the influence and interaction between various personal factors, including: <ul style="list-style-type: none"> • biological/physiological • psychological/cognitive/emotional • behavioral • social/environmental
Issues/Topics Worked With	<ul style="list-style-type: none"> • Cognitive, Emotional, Behavioral Problems (<i>With Clinical Diagnosis</i>) • Clinical Mental Health, Relationships, Career-Related (<i>With Diagnosis</i>) 	<ul style="list-style-type: none"> • Cognitive, Emotional, Behavioral Problems (<i>Without Clinical Diagnosis</i>) • General Health, Relationships, Career-Related (<i>Without Diagnosis</i>)
Education/Training	<ul style="list-style-type: none"> • Requires a minimum of a master-level education, training, supervised experience, and ongoing professional training • Client must be diligent in uncovering 	<ul style="list-style-type: none"> • Education, knowledge, and experience obtained in a variety of ways (formally and informally) • No formal education, knowledge, and experience required

	the education, knowledge, and experience to ensure value will be provided in <i>therapy</i>	<ul style="list-style-type: none"> • Client must be diligent in uncovering the education, knowledge, and experience to ensure value will be provided in <i>coaching</i>
Law and Ethics	<ul style="list-style-type: none"> • Governed by and works in accordance with state law for licensed mental health professionals • HIPPA-Compliant (Storage and portability of medical records) • In accordance with American Counseling Association's Code of Ethics 	<ul style="list-style-type: none"> • Voluntarily subscribes to ethics set forth by particular area of service • Examples: <ul style="list-style-type: none"> - Life Coaching: ICF Code of Ethics - Tutoring: ACTP Code of Ethics • - Fitness: NCSF Code of Ethics • No "Medical Records" kept • Confidentiality is still paramount
Payment	<ul style="list-style-type: none"> • Private Pay, Insurance (dependent on medical necessity) 	<ul style="list-style-type: none"> • Private Pay

The Client-Coach Relationship

It is very important to understand that coaching is a professional relationship. While it may often feel like a close personal relationship due to the often intimate and vulnerable topics discussed, the Coach-Client relationship is not one that can extend beyond professional boundaries. Considerable experience shows that when boundaries blur, the hard-won benefits gained from the coaching relationship can be compromised. The purpose of these boundaries is to ensure that you and your coach are clear in your roles for your coaching and that your confidentiality is maintained.

Most research on the outcomes in helping professions indicates that the quality of the relationship is the most influential factor correlated with positive outcomes. The client sets the agenda, and the success of the enterprise depends on the client's willingness to take risks and try new approaches. The relationship is designed to be compassionate and supportive, but also direct and challenging. You can count on your coach to be honest and straightforward, asking powerful questions and using challenging techniques to facilitate progress. When coaching is not working as you desire, it is important to inform your coach so both can take steps to improve the process.

If there is ever a time when you believe that you have been treated unfairly, please talk with your coach about it. It is never the coach's intention to cause hurt to clients, but sometimes misunderstandings can inadvertently result in hurt feelings. Your coach intends to address any issues that might get in the way of coaching as soon as possible. This includes administrative or financial issues as well.

If you and your coach see each other accidentally outside of your coaching sessions, your coach will not acknowledge you first. Your right to privacy and confidentiality is of the utmost importance and your coach will not jeopardize that privacy. However, if you acknowledge your coach first, they will be more than happy to speak with you.

Purposes, Limits, and Risks of Coaching

Most clients that obtain coaching services benefit from the process, but coaching, like most endeavors in the helping professions, is not an exact science. While the ultimate purpose of coaching is to reduce your struggles and increase your level of competence, confidence, and level of fulfillment in a specified area through a process of personal growth, there are no guarantees that the coaching provided will be effective, useful, or will yield intended positive results.

Self-exploration, increasing affect tolerance, gaining insight, exploring options for coping, learning new skills, or sharing feelings/experiences are generally quite useful, but there are some risks. The process of coaching usually involves working through distressing personal issues that can result in some emotional or psychological pain for the client. Please understand that some people experience uncomfortable feelings throughout coaching. Exploring life issues may elicit feelings of unhappiness, anger, sadness, grief, guilt, or frustration. These feelings are difficult, but a natural and normal part of coaching and the change process for growth. Coaching is limited to the specific goals you are voluntarily working on, but coaching may result in decisions about changing behaviors, employment, substance use, schooling, housing, relationships, or virtually any other aspect of your life. Sometimes these decisions, that are deemed positive by Client,

might viewed quite negatively by another family member. Change will sometimes be easy, swift, and rewarding, but often change will be challenging, slow, and frustrating. Change is a process. Change is hard work.

If the Coach or Client recognize that a problem would benefit from psychotherapeutic intervention, client will be referred to appropriate resources. In some situations, the Coach may insist that Client initiate and participate in psychotherapy as a condition of continued coaching.

**Coaching is not a substitute for getting legal, medical, financial, business, or psychological guidance. You agree to seek professional guidance in these areas, as needed. You understand that all decisions in these areas are your sole responsibility.*

Crisis Situations

Mastering ME LLC does not have the capability to respond immediately to emergencies or crises. Crisis situations and emergencies should be directed to community emergency services (911) or to the crisis line (MMIC Behavioral Health Crisis Line, 602-222-9444). Because our practice does not have in-house psychiatric medication management or crisis services we do not work with serious mental illness, violent behaviors, or personality disorders. If you present with these conditions, we reserve the right to refer you to appropriate providers or programs.

Privacy, Confidentiality, and Records

Confidentiality is the protection of any information obtained through the coaching process. To deliver continuity of your coaching sessions, your Coach *may* take general electronic notes/record keeping regarding your coaching sessions, including topics discussed, successes/progress recognized, struggles/problems experienced, next steps/action recommended from session to session, and financial records. Any notes taken and records kept are stored in a confidential manner. Furthermore, your Coach may expect you to take notes within or at conclusion of sessions to document learning, which serves as a reference and guide between sessions.

Ordinarily, all communications and records created in the process of coaching are held in the strictest confidence. However, there are numerous exceptions to confidentiality defined in the state and federal statutes. Limitations of such client held privilege of confidentiality exist and are itemized below:

1. If a client threatens or attempts to die by suicide or otherwise conducts him/herself in a way there is a substantial risk of incurring serious bodily harm.
2. If a client threatens grave bodily harm or death to another person.
3. If the therapist has a reasonable suspicion that a client or other named victim is the perpetrator, observer of, or actual victim of physical, emotional or sexual abuse of children under the age of 18 years.
4. Suspicions as stated above in the case of an elderly person who may be subjected to these abuses.
5. Suspected neglect of the parties named in items #3 and # 4.

Our Coaches may also participate in a process where selected clients/coaching sessions are discussed with other professional colleagues to facilitate continued professional growth and to get you the benefit of a variety of coaching experiences and skillsets. While no identifying information is released in this peer consultation process, the dynamics of the problems and the people are discussed, along with the coaching approaches and methods.

Confidentiality Exceptions

As you are no doubt aware, some means of communication, such as wireless telephones and e-mail may be not secure from eavesdropping. It is impossible to guarantee the protection of confidential information in certain circumstances involving computers. This is particularly true of email and information stored on computers that are connected to the internet. In my practice (both business and home offices), I take measures to prevent unauthorized access to information by utilizing encryption and other forms of security protection. You acknowledge that I cannot be held responsible for instances of loss of confidentiality through wireless telephone or computer hacking.

Availability & Communication

The best mode of communication will be email, at ryan@masteringme.org. Mastering ME LLC's main line is: 480-712-8733. Generally, voicemails and emails are returned within 48 hours, unless received on the weekends, holidays, or your coach is out of the office.

If you prefer to communicate via email or text messaging for issues regarding scheduling or cancellations, your provider will do so. A quick or immediate response in one situation does not constitute a commitment of rapid response in another situation. Please note that email and text communication is not considered to be a secured form of communication, and therefore information shared over email or text message cannot guaranteed confidentiality.

Social Media Policy

Because of the nature of the professional relationship, it is not appropriate for a client and coach to have connections or to 'friend' or 'follow' one another through personal use of social media including, but not limited to: Facebook, Instagram, Twitter, Snapchat, etc. Due to the importance of your confidentiality and the importance of minimizing dual relationships, our coaches do not accept friend or contact requests from current or former clients on any social networking site (Facebook, LinkedIn, etc). Adding clients as friends or contacts on these sites can compromise your confidentiality and our respective privacy. It may also blur the boundaries of the therapeutic relationship. If you have questions about this, please bring them up with your provider for discussion.

However, Mastering ME LLC may have professional social media webpages that you are welcome to follow. Note that any information you share on any social media webpage of Mastering ME LLC is not able to be kept confidential as it becomes public data. Any information that you share on the social media pages of Mastering ME LLC is shared at your own discretion without liability to Mastering ME LLC.

Termination Policy

Ending relationships is usually difficult. Therefore, it is important to have a termination process to achieve some closure. The appropriate length of the termination depends on the length and intensity of the coaching. Due to the voluntary nature of coaching, either party, Coach or Client, has liberty to terminate coaching, at any time, for any reason. Your coach may terminate treatment after appropriate discussion with you and a termination process if your coach determines that the coaching is not being effectively used or if you are in default on payment. Your coach will not terminate the coaching relationship/agreement without first discussing and exploring the reasons and purpose of terminating.

**Unless arrangements between Coach and Client are made, if Client fails to schedule an appointment and more than 30 days passes without any communication from Client, Coach will administratively close out of coaching services at that time. Coaching will be considered 'Terminated'.*

Dispute Resolution

Problems can arise in the relationship with your provider, just as in any other relationship. If you are not satisfied with any area of your work with your coach, please raise your concerns with your coach immediately. You can communicate in-person, preferably, or email your Coach at ryan@masteringme.org. Your work together will be slower and more challenging if you are not able to address your concerns. Your provider will make every effort to hear any complaints you have and to seek solutions to them.

Limitation of Liability & Waiver

You acknowledge and agree that throughout coaching services, you are fully responsible for your physical, mental, and emotional well-being, and for any actions, choices and decisions made as a result of the coaching. In no event shall "MASTERING ME LLC" or its service providers be held liable to client for any special, punitive, incidental, indirect, or consequential damages of any kind in connection with this signed "Coaching Agreement/Contract". You understand that your Coach makes no guarantees or warranties, expressed or implied, about any results to be achieved.

Consent for Coaching

Consent is hereby given for my Coach, Ryan Helton, at Mastering ME LLC. It is agreed that either of us may discontinue coaching at any time and that you are free to accept or reject the coaching provided. I understand that I have the right

to participate in coaching decisions, the formation of goals, and the development and periodic review and revision of my goals. In the case of a minor child, I hereby affirm that I am a custodial parent or legal guardian of the child and that I authorize services for the child under the terms of this agreement. I understand that no specific promises have been made to me by this Coach about the results of coaching, the effectiveness of the methods and procedures used by this Coach, or the number of sessions necessary for coaching to be effective.

I have read, or have had read to me, the issues, and points in this Coaching Agreement/Contract. I have discussed those points I did not understand, and have had my questions, if any, fully answered. I agree to act according to the points covered in this information. I hereby agree to enter into coaching with this Coach (or to have the Client enter Coaching), and to cooperate fully and to the best of my ability, as shown by my signature here.