

# COACH KELLY LLC COACHING AGREEMENT

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Text/Phone: 910-632-0781

Website: [coachkellyllc.com](http://coachkellyllc.com)

Thank you for making Coach Kelly LLC part of your financial plan (a Ramsey Solutions Master Financial Coach). We look forward to serving your needs! To help guide our relationship, we ask that you review the information below.

**SCHEDULING APPOINTMENTS** To schedule an appointment, please text or email us. 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 can be conducted in person, over the phone, or via video conference.

**HOURS OF OPERATION** We are open weekdays (M-F) 9am-2pm EST excluding holidays (Note: days and times are subject to change without notice). Messages can be left outside of business hours via text or email, however will not be returned until normal business hours.

**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** 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. All pre-paid sessions must be used within one year from date of purchase.

**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.

**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.

**RESCHEDULING APPOINTMENTS** If you need to reschedule your session for any reason, please give us at least 24-hour advance notice. No shows will be charged for the session and not refunded unless there is a documented emergency.

**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.