

Florian Santos, Life Coaching

Ground Rules and Coaching Agreement



Client Name: _____

1. How do we meet? (in person, zoom, facetime, phone) _____

2. Emails between sessions _____

3. Included members of family in sessions _____

4. Fees for cancellation _____

5. Emergency sessions _____

1. As a client, I understand and agree that I am fully responsible for my well-being during my coaching calls, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy, medical advice, or psychiatric care and that professional referrals will be given if needed.

2. I understand that "life coaching" is a relationship I have with my coach that is designed to facilitate the creation/ development of personal, professional, business, health, spiritual and other personal goals and carry out a strategy/plan/action for achieving those goals.

3. I understand that life coaching is comprehensive and may involve exploration into all areas of my life, including work, finances, health, spiritual, relationships, education, and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.

4. I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that life coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care, or substance abuse treatment, and I will not use it in place of any form of therapy.

5. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.

6. I understand that the information will be held confidential unless I state otherwise in writing, except as required by law.

7. I understand that certain topics may be anonymously shared with other life-coaching professionals for training or consultation purposes.

8. I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual, or other matters. I understand that all decisions in these areas are exclusively mine, and I acknowledge that my decision and my actions regarding them are my responsibility.

I have read and agreed with the above.

Client signature _____

Print Name _____

Date _____

Approved by: _____ Date _____

Mark Completed

- Client Meeting and Assessment
- Client Intake Form
- Ground Rules and Coaching Agreement
- Client Payment Agreement
- Specific goals and goal reassessment
- Strategy Sessions planned.
-

Client Name: _____

Client Goals	Client Directives	Modification	Notes

As we monitor the level of client comfort or discomfort in completing the assigned directives, which directive is working, and which directive is not working?

Strategy Sessions to Explore

Life Focus Discovery	Coaching Mandala	Communication Style
Mode of Being	Basic Human Needs	Most Valued
Life Stage	Key Decision	Fairy Godparent

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