

Simone Peer, Inc.

PROFESSIONAL CERTIFIED COACH - ICF MENTORING/SUPERVISION

COACHING/MENTORING/SUPERVISION TERMS & AGREEMENT

			Date Prepared
First Name		Last Name	
Street Address	City	State	Zip
Email Address		Phone (land and mobile/text)	
Current Occupation / Title		Nature of Business / Position	
If fees are sponsored by someone else, please complete:			
Financial Sponsor Name		Financial Sponsor Email	
Street Address	City	State	Zip
Email Address		Phone (land and mobile/text)	

What's memorable about you?
In what ways do you get in your own way?
As a Coach, what is the single most important 'thing' you want to be able to do extremely well?
What's it mean for you to 'Make It' as a Coach?

PREPARING COACHES TO MAKE IT, so THEY NEVER HAVE TO FAKE IT!

simonepeer.com
1.773.384.5683

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TERMS OF COACHING PG 2

The Terms and Agreement Set Forth: are between Simone Peer, Inc P.O. Box 2014 Key West, FL 33045 with services provided by Simone Peer, Inc (SPInc) / Simone Peer, PCC, PMC, CLC/T hereafter referred to as "Coach" and the above noted (information page 1) hereafter referred to as "Client." When fees are paid by a separate Financial Sponsor, they are referred to as "Financial Sponsor."

The Nature of the Coaching Relationship: The nature of the work is for the Coach to listen keenly and objectively, ask thought provoking questions, supply objective feedback and ideas and be available for brainstorming and discussion, and thereby to help the Client accomplish what s/he wants.

Coach agrees to communicate directly and honestly with the Client. Likewise, the Client agrees to communicate fully and honestly with the coach, to be open to feedback and assistance, and to devote the necessary time and energy to participate fully in the coaching relationship and the work that is to ensue from it. Client agrees to be in action on the matters at hand, and to provide honest feedback to the Coach on his/her perceptions of the relationship, the success of the mutual endeavor, and any changes needed in direction or technique.

Services Provided: The services to be provided by the Coach to the client are personal, professional, business, marketing, life coaching and/or coaching mentoring in the areas of personal, professional/skills and practice/business development, as designed jointly with the Client and in the case of mentoring congruent with either Coach Inc.'s 3 P's of Mentoring or the ICF's Competency & Ethics Development.

Other coaching services include, but are not limited to values, goals, purpose clarification; brainstorming; strategizing and designing plans for action; developing life and work systems; cultivating effective communication skills; building confidence; liberating self from old habits, ideas and patterns that get in the way of moving forward and staying forward.

Coaching, which is not advice, therapy or counseling, may address specific personal and business situations, conditions, projects, goals and visions in the client's life or profession.

The Coach Has a Background In: communication, business, marketing, career development, life and business systems, multiple income streams, business and personal turnaround, productivity and performance improvement, niche, branding and advanced coaching and coach mentoring techniques.

Additional relevant training and credentials include: Coach U Certified Graduate (CCG), Professional Certified Coach (PCC), Professional Mentor Coach (PMC), Certified Laser Coach (CLC), Certified Laser Coach Trainer (CLCT), ICF PCC-Marker Training Certified, Coach U Faculty Member, Certified Laser Focused Coaching Instructor and Masters of Arts Degree in Interdisciplinary Studies: Business, Education, Communication

Call Procedure:

Please call Simone on Conference Line: +1.712.775.7465 pin: 558237# at your appointed time. If Coach will be at any other number or using any other service (Zoom, Skype, etc), we will notify you in advance and give you the link or another number to reach her. If you get Coach's voicemail at the appointed time, please hang up and call back in about three minutes.

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TERMS OF COACHING PG 3

Scheduling & Sessions:

Appointments are booked either on a standard, recurring schedule or with flexibility to book for what works best at the time. Sessions times range from 55 - 75 - 90-minutes depending upon the individualized mentoring plan and objective of the session.

Mentoring Coaching Package Plans are customized to Clients needs and can include any of the following: Competency & Skills Development and/or Deep Dives, including Ethics & CKA Prep; Live Coach-the-Coach Sessions; Off-Call Recording Reviews; Follow-Up Calls to Review the Live or Recorded Coaching Sessions; Personal Development of Coach and Practice/Business Development of Coach

Recordings for Review should be no more than 45 minutes and must include a transcript. Please make sure your transcripts:

- Label each speaker correctly to indicate who is Coach or Client
- Include timestamps at every change in speaker (Coach / Client)
- Are verbatim - include the ums and ahs, interruptions, etc, i.e. word-for-word
- Label interruptions correctly indicating Coach or Client with timestamp
- Are verbatim - include the ums and ahs, interruptions, etc, i.e. word-for-word
- Are WORD: .doc / .docx Or PAGES: .pages, so Mentor can add comments directly.

Coach recommends RaeNotes.com, for two reasons: cheap (10¢ per minute for computer generated transcripts) AND ICF Core Competencies & PCC Markers are built in features for commenting. HOWEVER, you must review and make edits to ensure they meet the above guidelines.

Recording Review and Live Coach-the-Coach Sessions suggested to be scheduled no more than one per month.

Most sessions are booked via <http://TalkToSimone.com> (Acuity Scheduling). Confirmation emails are sent from: scheduling@acuityscheduling.com. Client can schedule and reschedule via a link in the email by setting up a username and password.

Effective, successful coaching requires a certain “pace” to maintain momentum. For monthly retainer engagements, unless mutually agreed upon in advance, for specific reasons, the regular number of sessions per month are to occur during that month and are not to be carried forward into the subsequent months. For coaching package engagements, sessions may be rolled forward as long as they are used within 18 months of purchase. Coach can work around illness or emergency, but please understand that missed sessions cannot be made up and do not roll over into the future. (See Rescheduling & Emergencies below)

Additionally, *Breakthrough Connections* are encouraged and included in the coaching fees. You may text, email or call between our scheduled sessions if you need input, have a problem/challenge, or can't wait to share a success. If you email or get voicemail, you will get a response within 24-72 hours; texting will usually render quicker response. I enjoy providing this extra level of service. If more than 5-10 minutes is needed, Coach will schedule a standard session as soon as possible.

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TERMS OF COACHING PG 4

Rescheduling & Emergencies:

If you need to reschedule an appointment, both parties agree to provide each other with preferred 48-hours and at least 24-hours, advance notice.

In the case of a legitimate emergency for Client or Coach leads to last minute cancellation or unavoidably missing an appointment, the session will be rescheduled for as soon as possible within the same month.

In the event of rescheduling, if not done via the acuity scheduling portal (TalkToSimone.com), Client must inform Coach via voicemail, email or text message.

Client understands that no make-up sessions are scheduled for no-shows/missed calls, not involving an emergency. For Clients that consistently miss appointments or arrive more than five minutes late to their sessions, Coach may terminate the relationship, without notice.

Commitment: The Client understands that in terms of time, there is a recommended minimum of a three-month commitment to coaching, this allows time to learn and implement new insights and ideas into their business and life.

I'm the type who commits to the work for as long as it takes for me to own it. I know that at that when I get to the point of "I've got this, whatever 'this' is!" there is a level of deeply seated confidence that knows there's no stopping me. If that's you, too, I'm not only honored, but very excited to commit my support to you, too!

Business development is dependent upon the individuals' knowledge base and ability to progress with skill and strategy development. Growth toward sustainability requires at least 18 – 36 months; this allows time to learn and implement the coaching and development into their business and their life.

Personal development is dependent upon how much bandwidth you have to dive in and explore the thoughts and patterns that are holding you back, as well as walk the parallel path of handling the conditions of the life you were leading while designing and moving into the more desired aspects of the life you're beginning to created and build. This takes time: sometimes leaps and bounds catapult you forward and sometimes it feels like things can't change fast enough. Either way, know that your Coach will help you see the continual progress you're making and you to make changes that are sustainable and lasting.

Mentor Coaching, in addition to the above aspects of coaching that may comprise mentoring, is dependent upon Client's current comfort, confidence, level of understanding and application of skills, competencies, PCC markers and ethics, along with available coaching tools, assessments, resources, application models and structures. Although Mentor Coaching for Credentialing requires a bare minimum of ten hours over three - six months, depending upon the credential sought, there really is a lot more to it when you want to excel at what you do. Many elect to maintain the mentoring relationship well beyond the minimum until they hit their Coaching Stride^(tm), where Confidence, Competence and Composure are you at your Coaching Best.

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TERMS OF COACHING PG 5

Commitment in terms of all in has another consideration and that's about the willingness to do whatever it takes to get to the point of "I've got this!" I am here to mentor and coach you to your highest level of success, which requires a commitment from you to be fully invested in your mentor coaching package and plan. To ensure we're both committed, have fully explored our fit and laid out Coach & Client expectations, fees are nonrefundable. When refunds are an option, you can have "one foot in" for the development you signed on for, and "one foot out" the door ready to run away from what it actually takes to get there. It is to *your* benefit to *decide before* purchasing your package and committing to work with me that I am the right mentor coach for you. If you're in, you need to be 100% in, just as I will be for you. In the case of emergencies or unusual mitigating circumstances, sessions can be put on hold for up to one year.

Termination:

Client may cancel anytime, but Coach requests a 30-day notice, in writing. This serves to set up Client for success and to co-create the closure and coaching completion plan. Cancellation must be in writing, by fax or email. If fees are owed at time of cancellation, full payment is due and payable at notification or at regularly scheduled billing cycle.

Billing:

Fees are paid on a retainer basis, i.e. in advance of scheduled appointment meetings, either on a monthly basis payable on the first day of the month, (or a specifically agreed date), or as a specified number of sessions paid in full prior to start of coaching engagement, or as otherwise agreed upon.

Client agrees to either: Instant Money Transfers via Zelle or CashApp; Automatic-Deducted Credit Card Payments via PayPal Subscription (3.9% of total is added for installment payments), Check or Bank transfers / Bill Pay may be arranged.

Confidentiality:

The coaching relationship, as well as all information (documented or verbal) that Client shares with Coach, as part of this relationship, is bound to confidentiality by the ICF Code of Ethics, but is not considered a legally confidential relationship. Coach will not, without prior permission from the Client, reveal or discuss the identifiable coaching relationship or any aspects of it, except as required by law, and as noted below in application of future Coaching Certification.

Neither will the Coach use any client information for her own benefit, except in Application of Certification; disclosure is confidential and limited to: name, contact info, start and end dates and total number of coaching hours; no personal notes or session content will be shared.

Coaching topics may be anonymously and hypothetically shared with other coaching professionals for coach professional development and/or consultation purposes, such as with other clients in support of expanding their perspective on their situation or prospective clients in consideration of hiring Coach.

Confidentiality for Financially Sponsored Client:

The Coach maintains confidentiality between Self and the Client. It is up to the Client to disclose progress to the Financial Sponsor. Coach can facilitate group meetings to discuss/explore progress and expectations. As warranted, Coach will maintain confidentiality between Self and Financial Sponsor.

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TERMS OF COACHING PG 6

Confidentiality of Coach Proprietary Materials

Client agrees and acknowledges that any information or materials and copies thereof: (i) which are considered by Coach to be proprietary to SPInc; (ii) which SPInc treats as confidential; (iii) which SPInc is developing or has developed in whole or in part; or (iv) which Client may obtain knowledge of, or access to, through this relationship are the property of SPInc and shall at all times remain the sole and exclusive property of SPInc. Client will not and will not permit others to duplicate or transfer or otherwise make the SPInc Proprietary Materials or the benefit thereof available to others without the prior written consent of SPInc, which may be withheld in SPInc's sole discretion.

Responsibility and Release of Liability:

Client acknowledges that the coaching relationship is in no way to be construed as psychological counseling or any form of mental or medical health or substance abuse diagnosis, care, treatment or therapy. Nor is coaching to be construed as financial, legal or medical advice or instruction. In the event that the Client feels the need for personal counseling/therapy, nutritional/medical consult, financial advice or legal counsel it is the responsibility of the Client to seek the appropriately licensed professional.

Client understands that coaching is by permission and hereby grants the Coach permission to coach. If the Client believes the coaching is not working as desired, the Client will communicate needs and work with the Coach to co-create a well-suited approach toward desired results.

Client acknowledges that Coach's services are consultative in nature and enters into coaching with the understanding that Client is solely responsible for creating their own results and hereby releases the Coach from any liability for adverse actions or results experienced by the Client as a result of the coaching relationship. Whereas the Coach undertakes to provide her best perspective on the work at hand, Coach makes no guarantees or warranties, express or implied. In no event, will the Coach be liable to Client for consequential or special damages. Client takes full and complete responsibility for all decisions and actions s/he takes, even when based on input from the Coach. The Coach makes no guarantees or warranties, written or oral, expressed or implied, as to either results to be obtained, or the consequences of any actions taken or not taken by Client.

Notwithstanding any damages that the Client may incur, the Coach's entire liability under this agreement, and the Client's exclusive remedy, will be limited to the refund policy related to the amount paid by the Client to the Coach under this agreement for all services rendered up until the termination date.

This is the entire agreement of the parties, and reflects a complete understanding of the parties with respect to the subject matter. This agreement supersedes all prior written and oral representations. If a dispute arises out of this agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to 30 days after notice given. If the dispute is not resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.

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TERMS OF COACHING PG 7

FINANCIALS & SCHEDULING:

The following are the arrangements parameters we verbally agreed upon during our discovery session and or contracting conversation with regard to scheduling and payments.

Package Selections & Financial Agreement: (Select One)

- ☐ \$ xxxx USD for a block of 10, 55-minute Sessions (scheduled as desired) along with email text contact in-between. (5% Discount off CoachU Supervision StartUp monthly rate equivalent)
This includes: 2, Live Coach-the-Coach Sessions OR 2, Off-Call Recording Reviews*
2 Follow-Up Calls to Review the Coaching Sessions
6 Competency & Skills Deep Dives, including Ethics & CKA Prep
- ☐ \$ xxxx USD for a block of 16, 55-minute Sessions (scheduled as desired) along with email or text contact in-between. (8% Discount off CoachU Supervision StartUp monthly rate equivalent)
This includes: 4, Live Coach-the-Coach Sessions OR 4, Off-Call Recording Reviews*
4, Follow-Up Calls to Review the Coaching Sessions
8, Competency & Skills Deep Dives, including Ethics & CKA Prep

* Recordings for Review guidelines are listed above under Scheduling. must include a clearly labeled (Coach, Client, Timestamp), reasonably accurate transcript and be no longer than 35 minutes, or you can tell me which 35 minutes to listen to. **Recording Review Sessions suggested to be scheduled no more than one per month.

- ☐ *Coaching Fees may be paid over time:* Three (10 Sessions) or Four (16 Sessions) Monthly Payments via PayPal Subscription with a 3.9% Installments Fee.

Or Pay In Full In Advance via:

- ☐ *Instant Money Transfers:* Zelle (id= 77...) or CashApp (id= \$...)
- ☐ *Check:* to be received/processed in full amount prior to first session
Payable to: Simone Peer, Inc *Mailed to:* xxxxxxxxxx
Key West, FL 33040
- ☐ *Bill Pay* via Wells Fargo Bank Routing #: 528700390 Account #:

Your first appointment is scheduled for: TBD at 00:00 a/pm ET.

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TERMS OF COACHING PG 8

COACHING AGREEMENT & SIGNATURES PAGE:

Confirmation of Agreement:

The previous seven pages **Terms of Coaching** are a binding part of this Agreement; and this Agreement is the sole and entire agreement between Coach and Client with respect to Coaching Services. No waiver of any provision, amendment, or modification of this Agreement shall be valid unless in writing and duly executed by both parties.

Please review, initial, sign and return the entire document with your initials on each page & signature below as proof of your agreement to the terms of coaching set forth and your consent for the coach to process or receive payments in accordance with this agreement.

- * Email: Mentor@SimonePeer.com
- * Fax: +1.xxx.xxx.xxxx
- * Snail mail to: (please let me know to expect this)
Simone Peer, Inc
xxxxxx
Key West, FL 33040
- * For your convenience, you may submit with 'electronic' signature.
 - Client agrees that Electronic Signature shall serve as and have the same effect as an original signature.

Coachee Name: _____

Coachee Signature: _____ Date: _____

Client / Financial
Sponsor Name: _____

Client / Financial
Sponsor Signature: _____ Date: _____

Initial to Agree

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Coach Signature & Name:

Simone Peer, CCG, PCC, PMC, CLC, CLCT