

Dan Kimball, BCC, CRC
Path4Change PLLC

Life Coaching Policies & Agreement

This document contains important information about my policies as well as information regarding your life coaching services. We can discuss and address any questions that you may have at any time.

My Professional Training & Coaching Style: I am a Board-Certified Life Coach (BCC) & Progressive Recovery Coach (PRC) from the Institute of Life Coach Training. As your Life Coach I will facilitate a process to help you make important changes in your life. In working with others just like you, I will be like an experienced guide on the path for change, helping you avoid any pitfalls along the way of where change does not occur.

There may be times where I give you feedback, challenge you to reframe your thinking, and even give you suggestions for consideration. However, the coaching process is not about telling or advising. You will set the action steps, and how you choose to act on those steps is your responsibility. Our relationship is a collaborative one, and the more you put into it the more you will get out of it.

I also hold a Masters in Counseling from the University of Phoenix, and am licensed in the state of Arizona. In providing Life Coaching to you, my intent will be to challenge, uplift, and support you psychologically. However, coaching is not psychotherapy, and I will not be providing counseling, therapy, diagnosis, treatment planning or symptom management. If issues arise that are best dealt within a therapeutic context, I will refer you to an appropriately trained licensed therapist.

Life Coaching Fees, Payments & Packages: Each coaching session is \$80 for a one-hour session. Payment is expected prior to time of service. In an effort to ensure prompt payment for service, you can book the session through our secure website using a credit card or PayPal. Sessions can be purchased individually or in a Coaching Package, which is offered at a discounted rate.

If you purchase a Coaching Package and are unable to use your sessions for any reason, you may put the remaining sessions for up to a 2-month hold. Coaching fees are non-refundable should you decide to quit the process, as the complimentary consultation is designed to ensure we are a good fit for each other.

Appointments: Each scheduled appointment/session will occur at a mutually agreed upon location and time. Sessions may take place within the Anthem community, by phone or online in a secure video platform.

Cancellation Policy: All appointments canceled or rescheduled with less than 24 hours remaining prior to session are subject to a non-refundable \$40.00 fee at my discretion.

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Late Arrivals: You can expect your appointment to start and end at the scheduled time. If you arrive late to your appointment, you will be seen for any time that is remaining, but lost time cannot be made up at that session. If you expect to be late, please let me know as soon as possible by leaving a phone message or contact me by email.

No Show Policy: All appointment no shows will be charged the full session fee, unless this is due to emergency or other understandable situation.

Phone and Email Contact: I can be reached by telephone call or email. If you need to contact me between sessions, please leave a detailed voice message at 602-999-1243 and your call will be returned as soon as possible. Please email me at dan@path4change.com at any time with questions or scheduling issues.

You may call, email or text between sessions if you need “spot coaching,” have a quick question or can’t wait to share a win with me. I enjoy providing this extra level of service to support your progress. I do not bill for additional time, but I ask that you please keep the extra calls to five or ten minutes. If you leave a message, let me know if you want a call back or if you are just sharing.

Client Portal: You may log into your Secure Client Portal, created just for you. In the Client Portal I may share additional content such as a questionnaire, worksheet, video or other information that may be of interest to you. You can log into this area at any time using your email/password to review and download any of the content provided there.

Confidentiality: All information shared within sessions, in emails, the portal or records pertaining to your sessions are kept confidential and may not be revealed to anyone without your written permission, except where disclosure is required by law.

When Disclosure Is Required: There are some circumstances where disclosure is required by the law. Those times are when there is a reasonable suspicion of child, dependent or elder abuse, neglect or exploitation, or if you present as a danger to self, to others, or to property.

Referrals & Testimonials: My practice grows by referrals. If you are benefiting from my coaching services, I hope that you will suggest my services to others or provide a positive review on social media. If you would like to provide a testimonial, I will use just your first name on the website along with your comments about Path4Change.

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Life Coaching Client Agreement

- 1) I understand that “life coaching” is a relationship I have with my coach that is designed to facilitate the creation/development of personal, professional or business goals and to develop and carry out a strategy/plan for achieving those goals.
- 2) I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. 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.
- 3) I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility. I am aware that I can choose to discontinue coaching at any time.
- 4) I understand that 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. If therapeutic services are needed professional references will be provided.
- 5) If I am currently in therapy or otherwise under the care of a mental health professional I have consulted this person regarding the advisability of working with a performance coach and that this person is aware of my decision to proceed with the coaching relationship.
- 6) I understand that my coach will maintain the confidentiality of our communications to the extent defined by the law.

I have read and agree to all of the above.

Client Signature

Date