

## Information and Agreement for Coaching/Consulting Services

### Introduction

This Agreement is intended to provide you with important information regarding my professional services and business policies. Any questions or concerns regarding the contents of this Agreement should be discussed with me prior to signing it.

### Services Provided

One-on-one sessions, in-person and online courses, workshops, groups and mentoring in the areas of fitness, nutrition, emotional health, mind-body integration, relationships, and awareness. Coaching/Consulting is not psychotherapy. Coaching/ Consulting does not address mental disorders as defined by the American Psychiatric Association. Your Coaching/ Consulting sessions are not a substitute for psychotherapy, mental health care or substance abuse treatment. Coaching/Consulting assumes the mental health of the client.

### Confidentiality

The information disclosed by you is generally confidential and will not be released to any third party without written authorization from you, except where required or permitted by law. Exceptions to confidentiality, include, but are not limited to, reporting child, elder and dependent adult abuse, when a patient makes a serious threat of violence toward a reasonably identifiable victim, or when a patient is dangerous to him/herself or to the person or property of another.

### Fee and Fee Arrangements

A fee of \$\_\_\_\_\_ will be charged for the agreed upon coaching package as described in the Pricing Package document. The coaching packages include a variety of services including a set number of one-on-one sessions, which we will schedule in advance and which have a 48-hour cancellation policy. You will not be charged for missed sessions if it is for prearranged vacation time or any sessions I am unable to attend. This policy is necessary because I reserve consistent regular times for you as long as you are a client and cannot generally use that time for anyone else. Because I understand it is not always possible for you to attend your regular appointment times, I will try to provide a mutually convenient and agreed upon time for a makeup session within a week of the missed session at no additional charge. It is very important to have consistency of progress with as little disruption as possible. This will greatly contribute to your successful outcome. Clients are expected to pay for coaching packages either in full at

the start or in agreed upon installments. I accept payment through Venmo, Paypal, cash, check (payable to Crystal Stokes), and credit card charged via PayPay.

### **Availability**

My office is equipped with a confidential voicemail system that allows you to leave a message at any time (805) 699-5502. I will make every effort to return calls the day you call, or within 24 hours (or by the next business day), but I cannot guarantee calls will be returned immediately. I am unable to provide 24-hour crisis service. If you need someone to talk to immediately, you may call the CRISIS HOTLINE at 1-855-278-4204. In the event that you are feeling unsafe or require immediate medical or psychiatric assistance, you should call 911, or go to the nearest emergency room. I check email regularly at me@crystalstokes.com.

### **Termination of Service**

During the 1-hr intake session, I will learn whether or not we feel comfortable working together. I will also be assessing whether my services can be helpful to you. If you have any questions about my work or procedures, please discuss them with me whenever they arise.

If either of us decides to terminate midway into the program, I will generally recommend that you participate in at least one termination session. These sessions are intended to give both of us an opportunity to reflect on the work that has been done, and discuss any issues that may seem unresolved or need further clarification. I will also attempt to ensure a smooth transition to another specialist by offering referrals if that is your desire.

I reserve the right to terminate the program at my discretion. Reasons for termination include, but are not limited to, untimely payment of fees, failure to comply with recommendations, conflicts of interest, failure to participate in sessions, if the client's needs are outside of my scope of competence or practice, or if the client is not making adequate progress.

### **Integrative Process**

Integrative sessions, courses, workshops and groups are a process in which the client(s) and I discuss a myriad of issues, events, experiences and memories for the purpose of creating positive change so the client can experience his/her life more fully. It provides an opportunity to better, and more deeply understand oneself, as well as, any problems or difficulties the client may be experiencing. Sessions are a joint effort between the

client and me. Progress and success may vary depending upon the particular problems or issues being addressed, as well as many other factors.

Participating in sessions may result in a number of benefits to the client, including, but not limited to, reduced stress and anxiety, a decrease in negative thoughts and self-sabotaging behaviors, improved interpersonal relationships, increased comfort in social, work, and family settings, increased capacity for intimacy, and increased self-confidence. Such benefits may also require substantial effort on the part of the client, including an active participation in the process, honesty, and a willingness to change feelings, thoughts and behaviors. There is no guarantee that sessions will yield any or all of the benefits listed above.

Participating in sessions may also involve some discomfort, including remembering and discussing unpleasant events, feelings and experiences. The process may evoke strong feelings of sadness, anger, fear, etc. There may be times in which I will challenge the client's perceptions and assumptions, and offer different perspectives. The issues presented by the client may result in unintended outcomes, including changes in personal relationships. The client should be aware that any decision on the status of his/her personal relationships is the responsibility of the client.

During the process, many clients find that they feel worse before they feel better. This is generally a normal course of events. Personal growth and change may be easy and swift at times, but may also be slow and frustrating. The client should address any concerns he/she has regarding his/her progress with me.

### **Acknowledgement**

By signing below, you acknowledge that you have reviewed and fully understand the terms and conditions of this agreement. You have discussed the terms and conditions with me, and have had any questions answered to your satisfaction. You also agree to abide by the terms and conditions of this agreement and consent to participate in the process of sessions, courses, workshops and/or groups.

\_\_\_\_\_  
Signature of Patient (or authorized representative)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Patient (Please Print)

Patient Phone numbers \_\_\_\_\_