



PERSONAL COACHING AGREEMENT

Thank you for making Many Blessing Financial Coaching part of your financial plan. I look forward to serving your needs and ask that you review the information below to help guide our relationship.

SCHEDULING APPOINTMENTS

To schedule an appointment, just call me at 270-307-8004. I understand that your time and resources are extremely valuable so I ask that you honor your scheduled appointment time. If you need to reschedule, just let me know so we can do so. Appointments can be conducted face-to-face or over the phone.

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 you will get out of the coaching session what you put into it.

COACHING SERVICES

I 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, I 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 me at least 24 hours' advance notice.

CONFIDENTIALITY POLICY

I will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to me or I generate. I will reveal such matters only upon receipt of a written authorization and clear, verifiable instructions from you telling me exactly what I may reveal.

DISCLAIMER

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. I am 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.