Start with clarity.
Move forward with purpose.

This form helps you and your coach decide whether coaching is a good fit, set clear goals, and agree on the practical and legal terms of working together.

Client and coach

Client's full legal name

Preferred name

Coach's full name

Agreement effective date

Program or package

Expected coaching period

How to use this document

1. The business completes the policy details on page 4 before presenting the form.
2. The client completes pages 2-3, reviews pages 4-7 and 9, and asks questions before signing.
3. The client initials the key acknowledgments and both parties sign page 8.
4. Each party keeps a complete signed copy.

Document control

Client copy provided

Coach initials

Contact details

Full legal name

Preferred name

Date of birth (18+ clients only)

Time zone

Email

Phone

Mailing address

☐ Email okay ☐ Text okay ☐ Voicemail okay ☐ Do not leave detailed messages

Emergency contact (optional)

Name

Relationship

Phone

Permission to contact

☐ Safety concern ☐ Scheduling only

☐ No permission

Access and communication

Preferred session format

☐ Video ☐ Phone ☐ In person ☐ Other

Accessibility, language, technology, or scheduling needs

How did you hear about GripNewLife?

Fit and support

Are you currently working with another coach, counselor, therapist, or healthcare professional? (Optional)

☐ No ☐ Yes ☐ Prefer not to answer

If yes, what coordination or boundaries would be helpful? Do not include information you do not want in a coaching record.

What brings you to coaching?

What would you most like to change, strengthen, or understand?

What would make coaching feel worthwhile over the next 30-90 days?

Choose your focus

- ☐ Confidence / self-worth Life
- ☐ transitions Relationships /
- ☐ boundaries Stress
- ☐ management
- ☐ Habits / accountability
- ☐ Career / purpose
- ☐ Communication
- ☐ Other

Your top three goals, in priority order

1.

2.

3.

Readiness to make changes (1-10)

Confidence you can follow through (1-10)

Strengths, barriers, and accountability

What strengths or supports can you build on?

What usually gets in the way?

How do you prefer to be challenged?

☐ Gentle reflection ☐ Direct feedback ☐ Specific action steps ☐ Accountability check-ins

Anything the Coach should know to help make coaching appropriate, respectful, and safe?

Coaching is collaborative. You may decline an exercise, pause, ask questions, or request a referral.

Complete these terms before signing

These details become part of the agreement. Do not leave a line blank. If a term does not apply, write “N/A.”

Business term	Agreed detail
GripNewLife legal entity / owner	
Business mailing address	
Business email and phone	
Program / package and deliverables	
Session length and frequency	
Session fee or package price	$
Taxes or processing fees, if any	
Payment schedule / due date	
Accepted payment methods	
Late-payment fee, if lawful	
Cancellation / rescheduling notice	At least _____ hours before the session
Late-cancellation charge	
No-show charge	
Grace period for late arrival	_____ minutes; session still ends at the scheduled time
Package expiration, if any	
Refund policy	
Governing state / country	
Courts / venue, where permitted	

_____ **Client initials - price and payment.** I reviewed the completed pricing and payment terms above, understand the total amount and due dates, and authorize only the payment method or recurring plan separately selected in writing. This form does not collect or store card details.

_____ **Client initials - cancellations and no-shows.** I understand the completed notice period and charges above. I will cancel or reschedule through the stated business contact method. A message is timely when received by GripNewLife.

1. Purpose and scope

GripNewLife provides professional life coaching: a collaborative, client-led process intended to support reflection, goal setting, decision-making, accountability, personal growth, and action. The Coach may offer questions, exercises, education, feedback, and resources. The Client chooses what to discuss and what actions to take.

_____ **Coaching is not licensed treatment or professional advice.** Coaching is not psychotherapy, counseling, psychiatry, medical care, diagnosis, crisis intervention, case management, legal advice, financial advice, or another licensed professional service. The Coach does not diagnose or treat mental-health or medical conditions and does not replace care from qualified professionals.

2. Client eligibility and responsibilities

- The Client confirms they are at least 18 and legally able to enter this agreement.
- The Client will provide accurate information, participate honestly, attend prepared, and communicate concerns or changing needs.
- The Client remains solely responsible for personal choices, actions, omissions, relationships, health decisions, finances, employment decisions, and results.
- The Client will seek appropriate licensed care when a concern is outside coaching scope. The Coach may pause or decline coaching and recommend another provider.
- The Client will not attend a session while driving, operating machinery, or in another unsafe or non-private setting.

3. No emergency or crisis service

GripNewLife is not an emergency service and does not provide 24/7 monitoring. Messages may not be seen immediately. If you may harm yourself or someone else, cannot stay safe, or face an urgent medical or mental-health emergency, call emergency services now. In the United States, call 911 or call/text 988. Outside the United States, contact your local emergency service or crisis line.

For remote sessions, the Client agrees to provide their current physical location and an emergency-contact name when reasonably requested for safety. The Coach may contact emergency services or the designated contact when the Coach reasonably believes disclosure is needed to address a serious and imminent safety concern, as permitted or required by law.

_____ **Client initials - emergency boundary.** I understand that coaching is not crisis care, that electronic messages are not monitored continuously, and that I must use emergency or clinical services when needed.

4. Results and participation

The Coach does not promise any specific result, income, relationship outcome, emotional outcome, publication, employment, health improvement, or timetable. Testimonials and examples describe individual experiences and are not guarantees. Results depend on many factors, including the Client's choices and circumstances.

5. Scheduling, payment, and refunds

- Fees are due according to page 4. Coaching may be paused while an undisputed balance remains unpaid.
- Sessions begin and end at scheduled times. A late arrival may shorten the session without reducing the fee, as stated on page 4.
- Late cancellations and no-shows are handled according to the completed policy on page 4, except where law requires otherwise or the Coach agrees in writing to an exception.
- Refunds, credits, package expiration, and unused sessions are governed by page 4 and applicable consumer law. Nothing in this agreement removes a right that cannot legally be waived.
- The Client will contact GripNewLife promptly about a billing error before initiating a payment dispute when practical. This does not waive any lawful chargeback or consumer right.

6. Confidentiality and its limits

The Coach will use reasonable care to keep coaching information private and will not intentionally disclose it except with the Client's permission, to operate the service through necessary vendors, to obtain confidential professional or legal consultation, to collect an unpaid account through lawful means, or when permitted or required by law. Examples may include a court order, suspected abuse where reporting is legally required, or a serious and imminent safety concern.

_____ **Coaching is generally not legally privileged.** Unlike some licensed healthcare relationships, coaching communications may not be protected by therapist-client, physician-patient, or attorney-client privilege. Absolute confidentiality cannot be guaranteed.

7. Communications and boundaries

- Routine email and text are for scheduling, logistics, and brief check-ins unless the program states otherwise. They are not appropriate for emergencies.
- Response-time expectation: within _____ business day(s), excluding weekends and holidays.
- Office / messaging hours: _____.
- Social-media follows, comments, direct messages, and public interactions are not required and may not be private. Coaching concerns should use the agreed private channel.
- The Client will not record, livestream, photograph, or distribute a session without written permission. The Coach will not record a session without the Client's separate written consent.

8. Technology, privacy, and records

Coaching may use video, phone, email, text, scheduling, payment, cloud-storage, or other third-party services. Although reasonable safeguards will be used, no electronic system is completely secure or interruption-free. The Client accepts ordinary technology risks and is responsible for a private setting, secure device, updated software, and reliable connection.

GripNewLife may keep intake forms, agreements, session notes, invoices, and communications for business, legal, insurance, and continuity purposes, then delete or destroy them according to its written retention practices and applicable law. Record-retention period: _____.

9. Voluntary participation and assumption of ordinary risk

The Client participates voluntarily. Coaching may involve discussing difficult experiences, receiving challenging feedback, changing habits, or making personal decisions. The Client accepts the ordinary emotional, interpersonal, professional, and financial uncertainty that may accompany voluntary change and agrees to pause, decline, or seek qualified support when appropriate.

10. Limitation of liability

To the fullest extent permitted by applicable law, GripNewLife, its owner, coaches, employees, contractors, and agents will not be liable for indirect, incidental, special, exemplary, punitive, or consequential damages, or for lost profits, opportunities, data, or goodwill arising from coaching or the Client's use of information or resources. To the fullest extent permitted by law, aggregate liability for any claim will not exceed the fees the Client actually paid to GripNewLife during the three months before the event giving rise to the claim.

This limitation does not apply where prohibited by law and does not excuse gross negligence, willful misconduct, fraud, or another liability that cannot legally be limited or waived.

11. Client materials and intellectual property

The Client keeps ownership of original materials they bring to coaching. GripNewLife keeps ownership of its original worksheets, methods, prompts, course content, designs, recordings, and other materials. The Client receives a personal, limited, non-transferable license to use supplied materials for their own noncommercial purposes. The Client may not resell, publish, teach from, copy in bulk, or distribute them without written permission.

12. Testimonials, photos, and recordings

No testimonial, name, image, likeness, story, session recording, or identifiable client result may be used for marketing without a separate, specific written release. Declining a release will not affect services.

13. Ending coaching

Either party may end coaching by written notice. GripNewLife may end or pause services for nonpayment, repeated missed sessions, harassment, unsafe conduct, boundary violations, lack of fit, conflicts of interest, or needs outside coaching scope. Fees, credits, and refunds after termination follow page 4 and applicable law. Sections intended to survive - including payment obligations, confidentiality limits, intellectual property, dispute terms, and liability limits - remain effective.

14. Concerns and disputes

The parties will first try in good faith to resolve a concern through written notice describing the issue and requested solution. If not resolved, they may agree in writing to mediation. Otherwise, disputes will be handled under the governing law and venue completed on page 4, subject to applicable law and any non-waivable consumer rights. No arbitration obligation is created by this form.

15. General contract terms

This document, its completed page 4 terms, and any signed program addendum are the entire agreement. Changes must be in writing and accepted by both parties. If one provision is unenforceable, the remaining provisions continue to the extent permitted by law. Failure to enforce a term once is not a waiver. The Client may not transfer this agreement without written consent. Electronic signatures and counterparts are permitted to the extent allowed by law.

Client acknowledgment

By signing, I confirm that I:

- read all nine pages, had the opportunity to ask questions, and received completed business terms before signing;
- understand the difference between coaching and licensed healthcare, psychotherapy, crisis, legal, and financial services;
- understand the emergency, confidentiality, payment, cancellation, refund, technology, intellectual-property, and liability terms;
- am entering this agreement voluntarily and will keep a signed copy;
- confirm that the information I provided is accurate to the best of my knowledge.

Client signature | **Date**

Client printed name | **Time zone**

Coach acknowledgment

By signing, the Coach confirms that the scope, fees, policies, communication boundaries, and reasonable questions were discussed and that the Client will receive a complete signed copy.

Coach signature | **Date**

Coach printed name / title | **GripNewLife entity name**

Optional permissions

These choices are not required to receive coaching and may be withdrawn prospectively in writing.

☐ **I agree** ☐ **I do not agree**
I may receive appointment reminders and brief logistical messages by the methods selected on page 2. Standard carrier rates may apply.

☐ **I agree** ☐ **I do not agree**
GripNewLife may send occasional educational or promotional emails. I may unsubscribe at any time. This permission is separate from service-related messages.

Coach use only

- ☐ Identity / age confirmed as appropriate
- ☐ All page 4 terms completed
- ☐ Scope and crisis limits reviewed
- ☐ Signed copy provided
- ☐ Payment authorization stored separately
- ☐ Referral or coordination needed
- ☐ Privacy / retention notice provided
- ☐ Insurance requirements checked

Notes / agreed addenda (do not include unnecessary sensitive information)