



CDC Certified Divorce Coach®

Lori Heller www.loriheller.com



Personal Information and Goals

Name	Evening Phone
Address	Occupation – Employer-Company Name
City, State, Zip	Birthday
Cell phone Fax	Contact in Case of Emergency:
Email	Spouse – Partner Name
Day Phone	Children’s Names- Ages
What or who motivated you to meet with me?	
What is your relationship/marriage status?	
If the relationship/marriage is ending, are you the initiator or is the other person the initiator?	
Duration of relationship/marriage? Is this your first, second, or more relationship/marriage?	
Are you still together or have you separated? If separated, how long?	
What other people or resources have you met with or explored relative to your situation?	
What are the three biggest concerns and most important outcomes that you want to have?	
What do you see as the next step for you, both short-term and long-term?	

Are you in fear for your safety or for the safety and well-being of others in your household?

Coaching Agreement

I am here as a thinking partner, sounding board, and champion for you to focus on what you want and need from the process of the dissolution of marriage (divorce), to help you to move forward through the business of divorce, setting goals and taking actions to move forward, and doing the internal work necessary to go through the process of transition as productively as possible.

Here is what it will take for this coaching relationship to work for both of us:

You (as client) promises to:	I (as coach) promise to:
✓ Come to the call expecting to have a productive coaching session	✓ Show up for you ready to work on your agenda without judgment.
✓ Call my coach at the scheduled time.	✓ Send you reminder notices about your calls and the Call Strategy Form
✓ Focus each session on the most important areas for my moving through and beyond the divorce process.	✓ Respect your boundaries and ask for permission to talk about sensitive areas.
✓ Give my coach at least 24 hours notice if I need to reschedule our coaching session.	✓ Be flexible to the extent that my schedule allows in accommodating unforeseen events.
✓ Accept responsibility that if I miss an appointment, it will not be made up.	✓ Hold your reserved call times to the exclusion of everything else.
✓ Take on my coaching commitments and do what I said I would do.	✓ Ask you to stretch yourself and try on the negotiated coaching request.
✓ Call my coach for coaching between sessions when I find myself stuck or not in action.	✓ Make myself available to you for brief calls, review materials or answer emails between sessions.
✓ I will tell the truth to myself and to my coach.	✓ Be direct in my communication when appropriate – always with your permission.
✓ Give my coach feedback on our coaching sessions, including what is working and not working.	✓ Commit to having the coaching process be an experience that really works for you!
✓ Be responsible for choosing my attitude no matter what the circumstances!	✓ Be your champion!

Disclaimers

1. As the client, I understand that a coach is not a therapist. Coaching is designed to focus on taking action to help me accomplish my goals. I accept responsibility for my own mental health throughout the process.
2. The information exchanged between coach and client is confidential except as required by law.

3. As the client, I understand that a coach is not an attorney and cannot advise me on my rights or issues in my case. I am responsible for consulting with an attorney regarding any legal matters throughout the process.
4. As the client, I understand that a coach is not a CPA or licensed financial advisor and cannot advise me on financial issues and/or tax matters in my case. I accept responsibility for any financial/tax matters throughout the process.

Coaching Agreement

Please complete this agreement, review the terms, sign, scan and email to divorcecoachlori@loriheller.com

Thank you!

Billing Information

Goals to be accomplished in Coaching:	Desired Coaching Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed Preferred Days and Times	Preferred Communication Method: <input type="checkbox"/> Home phone <input type="checkbox"/> Cell Phone <input type="checkbox"/> Other Number: <input type="checkbox"/> Email: <input type="checkbox"/> Text:
Agreed upon Fees	Preferred Payment Method: <input type="checkbox"/> Credit Card <input type="checkbox"/> Check <input type="checkbox"/> 3 rd Party Paying - provide details, please.	Billing Frequency: <input type="checkbox"/> Monthly due on the first of the month for services in that month. <input type="checkbox"/> Other Arrangement [describe]

Your payment will be made online to ensure compliance with local privacy and security requirements. I will send you a link to a system where you will complete the payment. You will provide your billing information in a secure system to hold your sensitive information confidential, even from me as your coach. I will advise you if I do not receive that payment.

CANCELLATION REFUND POLICY

Three-Day Cancellation: A client who provides written notice of cancellation within Three (3) business days, excluding weekends and holidays, of executing the coaching agreement is entitled to a refund of all monies paid.

Other Cancellations: A client requesting cancellation after the access to or start of the coaching sessions is entitled to a refund of all monies paid, less the non-refundable registration fee of \$100 or the prorated amount of the fee based on elapsed time as a percentage of the agreement period, whichever is greater.

Completing the Coaching Agreement:

The client may choose to stop coaching at any time, subject to the terms of this agreement. Please put the notification in writing via email or fax. Please include the last date of the coaching sessions. No refunds of monies are offered to students post-completion of the coaching agreement.

I understand that the checklist on the accompanying page and on this page constitute the agreement with my coach, and I agree that these terms are understood to be fair to both coach and client.

Client Signature and Date:

Coach Contact information:

Name and Address:	
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Phone:	Email:
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