



All the Colors

Coaching Engagement Agreement

This agreement, between Diana Gisel Yañez, MA, CFP®, RLP® (Coach) and _____ (Client), includes _____ Coaching Sessions. Session length is typically 75 minutes. All coaching should be completed within _____ months of the start date unless otherwise agreed upon.

1) Coach-Client Relationship

The services provided to the client include a powerful, comprehensive process for personal transformative coaching, as designed jointly with the client. Coaching may address specific personal projects, business goals and opportunities, or general conditions in the client's life. Though the coach is a professional partner, the client determines the focus of the coaching and is responsible for their own process and end results.

It will also cover financial capability as it relates to understanding personal finance concepts in the worlds of cash flow management, investing, insurance, estate planning, and taxes. The Coach may offer referrals to relevant professionals including accountants, lawyers, and investment services. The Coach does not receive payment from third parties for referrals.

Please note that this relationship IS NOT INVESTMENT ADVICE. The Content is for informational and educational purposes only. You should not construe any such information or other education material as legal, tax, investment, financial, or other advice. Content provided is also of general nature and does not address the circumstances of any particular individual or entity. Nothing contained



constitutes a solicitation, recommendation, endorsement, or offer to buy or sell any securities or other financial instruments.

We hold all coaching conversations as confidential, and will not voluntarily divulge information about a coaching relationship without the written or verbal permission of the client. We follow the International Coach Federation (ICF) Code of Ethics. The Coach acknowledges not being an ICF registered coach. However, please be aware that the Coach-Client relationship is not considered a confidential relationship (like the medical and legal professions) and thus communications are not subject to the protection of any legally recognized privilege.

To begin the coaching relationship, and to maximize effectiveness, please commit to the following:

- Be on time and fully present for all coaching conversations. Please give at least 24 hours' notice for any cancellations.
- Be honest. Your coach's job is to support you in those actions YOU have chosen for yourself. Use your coach as a resource to help you look at what stops you from taking action and moving towards your vision.
- You realize that you are completely responsible for your own growth and learning, your own actions and inactions.
- You agree to communicate any concerns you have about the nature of your coaching relationship, your experience of the coaching relationship or any particular interactions with your coach.
- You realize that your coaching relationship is a resource, and that it is up to you to fully utilize this resource.
- There may be times in the coaching process where you confront realizations that are uncomfortable. At times, your coach may ask questions which seem probing. Look now and decide if you can give your coach full permission to be bold and forthright in your interactions, in service to your coaching goals and desired outcomes.



2) Services

The parties agree to engage in an ongoing Coaching Program with scheduled meetings of at least monthly intervals. Coach will be available to Client by email in between scheduled meetings, please expect a response within 3 business days. The Coach may also be available by phone in between meetings as arranged and agreed by email prior to a call. In the event phone or video calls become an ongoing occurrence due to circumstances, the Coach may augment the current agreed upon fee schedule for services in alignment with Section 3 of this agreement.

3) Payment Fees and Schedule

This Coaching agreement is valid as of the date the deposit is paid. The agreed upon fee is \$_____ per session with a minimum commitment of three sessions. The fee per session is between 1-3% of your pre-tax monthly income.

The initial commitment will be for _____ sessions and total \$_____, with half of this (\$_____) paid as a non-refundable lump sum upon the acceptance of this agreement, and \$_____ per month for the following _____ month period.

Upon using all the sessions agreed to or reaching 12 months from the date of this agreement, whichever comes first, the relationship will be assumed to be completed unless the Client selects to have an ongoing commitment or ad hoc coaching. The rate will continue as agreed to per 75 minute session unless a different amount is decided.

The Client can email and send voice notes to Coach in between sessions. Coach will respond within 3 days with thoughts or to let Client know they can discuss the issue/question more fully at the following coaching session.



4) Termination of Relationship

Either the Client or Coach may terminate this Agreement at any time with two weeks written notice. Client agrees to compensate the Coach for all Coaching services rendered through and including the effective date of termination of the Coaching relationship. Coach will reimburse amounts paid over the initial deposit for any services not rendered.

5) Limited Liability

Except as expressly provided in this Agreement, the Coach makes no guarantees, representations or warranties of any kind or nature, express or implied with respect to the Coaching services negotiated, agreed upon and rendered. In no event shall the Coach be liable to the Client for any indirect, consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach's entire liability under this Agreement, and the Client's exclusive remedy, shall be limited to the amount actually paid by the Client to the Coach under this Agreement for all Coaching services rendered through and including the termination date. Please refer to [All the Colors' Terms and Conditions](#) for further details.

As a client, I understand and agree that I am fully responsible for my well-being during my coaching calls. I understand that coaching is not therapy nor a substitute for professional healthcare. I take full responsibility for all actions I take as a result of coaching and neither All the Colors nor Diana Gisel Yañez (Coach) can be held responsible for any action taken or not taken as a result of coaching.



Accepted:

Signature: _____

Signature: _____

Coach: Diana Gisel Yañez _____

Client: _____

Email: diana@allthecolors.net _____

Email: _____

Phone: 562-281-5143 _____

Phone: _____

Date: _____

Date: _____