

**Seacoast Coaching Connection**  
Office of Margot Petler, MS CPRP  
617-413-1027  
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[www.seacoastcoachingconnection.com](http://www.seacoastcoachingconnection.com)

Date:

Name:

Parent's Name(s):

Mailing Address:

Day Phone(s):

Evening Phone(s):

Cell Phone(s):

Email Address:

Date of Birth:

School:

Age:

Name and Phone Number of Emergency Contact:

Agreed Upon Fee Per Session: \$

I AGREE TO THE GUIDELINES LISTED BELOW:

Youth Signature: \_\_\_\_\_

Parent(s) Signature: \_\_\_\_\_

**Important Information:**

My phone number is 617-413-1027. In this agreement, we are both acknowledging that there is no emergency phone number. All substantive questions are held for time in coaching sessions. If I am out-of-town or unable to answer my phone, please leave a message on my phone voicemail or send me an email and I will return your call or email as soon as I can. I work in 60-minute sessions. When we make an appointment, I promise to be there at the agreed upon time and you are promising to be there, too. Please give me 24-hour notice for cancellations.

**Services:**

My role is to provide professional coaching services to you. This does not include psychotherapy, family therapy, determining custody, psychological advice, being an advocate or serving as an expert witness. Coaching varies depending on the personality of the patient and consultant. Coaching requires active effort. We will need to work on setting goals and finding solutions to problems in sessions and at home. Coaching has benefits and risks. Risks may include feelings of sadness or worry, yet coaching is defined by its emphasis on positive thinking and creating achievable goals. Coaching can bring benefits and can lead to increased problem solving, better relationships and feeling happier.

Our first sessions will involve an assessment of your needs. After that, I will offer you initial impressions and we will co-construct a plan based on ascertainment of your issues, creating aspirations, composing answers to questions, identifying underlying assumptions and assessing our work together. Please evaluate this information along with your own thoughts about working with me. Coaching involves commitment. If you have questions about procedures, please ask. If you have concerns, please mention them up before difficulties arise. If you would work better with another coach, I can help with referrals. The purpose of coaching is to develop and implement strategies to help you to reach clearly- specified goals related to enhanced work and relationship performance. Coaching may address specific personal projects, life balance, job performance and satisfaction, or general conditions in the client's life. Coaching utilizes personal strategic planning, value clarification, brainstorming, motivational improvement and other coaching techniques. Aspirations and goals will be established at the outset of the coaching relationship. With your consent, these goals may be reviewed each session to determine their effectiveness. Although professional coaching is often effective in enabling individuals to significantly improve life satisfaction, there is no guarantee that these services will accomplish the de-sired outcomes. The success of coaching depends largely upon your willingness to take risks, look at cultural assumptions that get in your way, try new approaches, and follow through on action plans.

**Meetings:**

If coaching is initiated, we will schedule a 60-minute session at a mutually agreed upon time. Once this appointment is scheduled, you will be expected to pay for it at the time of meeting unless you give me 24-hour notice of cancellation or unless you become ill.

**Professional Fees:**

My fee per session is \$80. In addition to appointments, it is my practice to charge this amount on a prorated basis for other professional services you may require such as report writing, telephone conversations, attendance at meetings, coaching with other professionals whom you have authorized, preparing records or summaries, and the time required to perform any other service. If you become involved in litigation, I will not be able to assist you in any form of legal matters, as I am not trained in that way.

**Billing and Payment:**

You will be expected to pay for each session at the time it is held. If your account is more than 30 days overdue, and suitable arrangements have not been agreed to, I have the option of using legal action to secure payment. This includes my retaining collection agencies and/or going to small claims court. If legal action is necessary, the costs of that proceeding will be included in my claim. In most cases, the only information which I release about coaching would be the name, service, and amount due. In order for us to set realistic treatment goals, it is important to evaluate what resources are available to pay for your coaching.

**Professional Coaching Records:**

Both the law and ethics require that I keep coaching records. You are entitled to have a copy of your records or request a summary. These are professional coaching records and can be misunderstood. If you would like to see your records, I recommend that we review them together. There is the usual fee of \$80 per hour to comply with record request preparation time. Families may have treatment records with more than one person. All family members agree that the coaching records will be released only with mutual consent. In the event of a disagreement, the records will not be released without a court order.

**Minors:**

If you are under 18 years of age, please be aware that the law may provide your parents with the right to examine your coaching records. It is my policy to request an agreement from parents that they consent to give up access to your records. If they agree, I will provide them with only general information about our work together unless I believe there is a risk of harm to yourself or another person. If there is a risk of harm, I will notify your parents immediately. I will provide parents with a summary of treatment. When I am coaching a minor and problems arise, I will discuss with the minor and try to resolve any concerns and problems before talking with her/his parents or guardians.

Coaching involves goal setting and both minors (those under 18) and their parents may have goals for the coaching sessions. It is important that parents and children work toward similar goals and that there are meetings where goals can be set and agreed upon by

all involved. In the case that competing goals are desired, it is important to acknowledge that parents have legal responsibility for their children until the age of 18.

**Nondisclosures:**

Laws protect confidentiality and I can release information only with written consent. There are a few exceptions. In judicial proceedings, you have the right to prevent me from providing information about your coaching. In some circumstances, the judge will require my testimony if it is determined that the case demands it. There are some instances where I am legally required to take action to protect people from harm, even if it requires revealing information about coaching. For example, if I believe that a child or elderly person is being abused, I must report this to a state agency. If I believe a person is threatening serious bodily harm to another person, I am required to take protective action that may include notifying the victim, police, or seeking hospitalization. If a person threatens to harm him/herself, I may be required to seek help for the person or contact family or friends who can help. I may occasionally find it helpful to consult about a case with other coaching professionals. I conceal identities during consultation with coaches and the consultant is ethically bound to maintain confidentiality. Unless you object, I will not mention these coaching consultations unless I feel it is important to our work together.

While this is a summary of exceptions to confidentiality, it should prove helpful in informing you of potential problems and encourage you to talk about any concerns. These are legal issues and given that I am not an attorney, you may want to seek formal legal advice. If you request, I can provide you with relevant portions of applicable state laws. Your signature on the front page shows you agree to abide by these terms of our professional relationship.

**Mutual Nondisclosure:**

The coach and client mutually recognize that they may discuss future plans, job information, goals, personal information, and other private information. The coach will not communicate the client's information to a third party. In order to honor and protect the coach's intellectual property, the client likewise agrees not to disclose or communicate information about the coach's practice, materials or methods to any third party.

**Feedback:**

If at any time, you feel that your needs are not being met or you are not getting what you want out of the coaching, please tell me so we can discuss your needs and adjust your coaching program as needed. We will continue to work on the goals that you define unless you want to stop, which we will do whenever you ask.

**Dispute Resolution:**

Any controversy or claim arising out of or relating to this agreement, or the breach of this agreement, shall be settled by arbitration. The costs of arbitration shall be decided upon during the arbitration process.

**Control of the Coaching Process:**

There are times when a third party or agency has some control over the coaching process. The agency may include a business, government agency, or school. At times, the control may be determined by the agency that authorizes or pays for the coaching. If there is outside control over the coaching that takes place between me, the coach, and you the recipient of the coaching, then the agency's needs and focus will play a role in the work that we do together. We are both agreeing to follow the rules and guidelines of the outside agency to the best of our ability.