



# Wells Consulting Services, LLC

Professional Coaching & Assessment Services

## CLIENT INFORMATION & COACHING POLICIES AND PROCEDURES

Welcome! Thanks for choosing to work with me as your coach. I look forward to beginning this journey together and assisting you in accomplishing your goals. Please complete the client intake, read my coaching policies and procedures.

**Please sign the document and return a copy to me by mail or fax (860) 521-8422.**

Client Name \_\_\_\_\_

Address: \_\_\_\_\_

Phone Numbers      Home                      Work                      Cell

Email \_\_\_\_\_

Employer \_\_\_\_\_

Title \_\_\_\_\_

How Long? \_\_\_\_\_

Job Description \_\_\_\_\_

DOB \_\_\_\_\_

Religion (optional) \_\_\_\_\_

Marital Status \_\_\_\_\_

Children? \_\_\_\_\_

Start Date \_\_\_\_\_

Length of  
Commitment \_\_\_\_\_



## COACHING POLICIES AND PROCEDURES

### PAYMENT

Your coaching investment is \_\_\_\_\_.

You have agreed to pay **Wells Consulting Services, LLC**

- Per Session** based on the above coaching and assessment fees.
- Monthly: due upon the first of the month, for that month's coaching.** Coaching cannot begin until this agreement and policies documentation is signed. Please make checks payable to **Wells Consulting Services, LLC**

### COACHING SESSION PROCESS

Our coaching will take place

- At my West Hartford, CT office location (924 Farmington Ave, Suite 103).
- Local Phone (860.608.9355) for our scheduled sessions.

### EXTRA TIME

You may also e-mail me anytime at [kristawells@sbcglobal.net](mailto:kristawells@sbcglobal.net) and I will make every effort to respond within 48 hours. I also offer "flash sessions" which are a 5-10 minute phone and these sessions can be used in an emergency.

### CANCELLATION

**Cancellation of a scheduled coaching session must be made with at least 24-hour notice.**

If you must cancel, we will make it up so that you will still be attending the same sessions agreed upon per month. If this happens more than once, I do charge a fee to resume coaching contract with me; no exceptions.

### FEEDBACK

I want your input to our process. I promise to do what is necessary to have you be satisfied, and we will work on all things as a team. I will ask directly for feedback from time to time, to make sure you are getting what you need.

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## **REQUESTS REGARDING HOW WE WORK TOGETHER**

- I ask that you make an effort to show up for our sessions on time, and that you come prepared for the call/appointment.
- As aforementioned, I ask that you be honest with me, not only regarding providing feedback on the coaching process, but most importantly, in what you share during our sessions.
- I request that you be willing to try new things in order to make rapid and meaningful progress with your goals.
- I request that you consider getting access to e-mail if you do not already have it. Our work will be much more expedient that way.

## **CONFIDENTIALITY**

All information shared with me during the coaching and project process is held with the utmost confidence. Also, at no time will any personal, business or other proprietary information be used directly or indirectly, for my own or my company's own benefit.

## **COACH DISCLAIMER OF LIABILITY:**

Coaching is specialized type of consulting that is implemented with functional individuals who want their lives and careers to be exceptional.

Client hereby employs **Krista Wells** as Coach for the purpose of advising Client with respect to Client's career management and/or career search, and setting and achieving the Client's personal and professional goals. **Krista Wells** agrees that she is not an employment agent, a business manager, a financial analyst or a licensed psychotherapist, and that she has not promised, shall not be obligated to, and will not: (1) procure or attempt to procure any employment, business or sales for the Client; (2) perform any business management functions such as accounting services, tax or investment consulting, or advise with regard thereto; or (3) if the Client needs more in depth counseling or services, it is the responsibility of the Client to seek a licensed professional.

Specific results are not guaranteed. The Client enters into coaching with the understanding that the Client is responsible for creating his or her own results. The Client also agrees not to hold the Coach or **Wells Consulting Services, LLC** liable for any actions or results related to adverse situations created as a result of a specific referral given by the coach.

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**Wells Consulting Services, LLC**  
Professional Coaching & Assessment Services

Above agreed to by

\_\_\_\_\_  
(Client signature)

\_\_\_\_\_  
(Client name printed)

On

\_\_\_\_\_  
(Date)

And by

\_\_\_\_\_  
(Coach signature)

\_\_\_\_\_  
(Coach name printed)

On

\_\_\_\_\_  
(Date)