

Brian H. Farr
Financial Coaching

FINANCIAL COACHING AGREEMENT

This agreement outlines the terms and conditions for your proposed program of Financial Coaching. Our initial session and all subsequent sessions will be scheduled by mutual agreement. Sessions will have a duration of approximately 60 minutes or 90 minutes, to be decided by mutual agreement. M sessions with individuals or couples living outside of Oregon are conducted through an online platform such as Zoom, or via telephone.

48-hour notice is requested for cancellation or rescheduling of sessions, with the exception of medical or family emergencies. If there is an unanticipated conflict on my part requiring the cancellation of a session, I will do my best to reschedule at the earliest possible date.

The initial goals of this financial coaching program will be explored and clarified during our first and second coaching sessions. These goals can be expanded or changed, based upon your own understanding and development.

All information shared by you during these financial coaching sessions will be kept confidential and private. Information will not be disclosed to anyone unless you specifically instruct me to disclose, or disclosure is required by law, or an intent to harm oneself or others has been disclosed. Of course, you may share information arising from these sessions with anyone you choose.

By signing this agreement, you agree that the purpose of these coaching sessions is NOT to provide psychotherapy, nor to provide legal advice, tax advice or any specific advice concerning business decisions, investments or financial transactions. In the event of any disputes, you agree that punitive damages will be limited to the amount of compensation paid by you for this coaching program.

The fee for financial coaching sessions is \$130 for individuals and \$145 for couples. Payment is due at the conclusion of each coaching session by check, credit card or other digital payment forms. The total number of coaching sessions varies with individual clients.

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To confirm your acceptance of the above terms, please sign below and return a copy of this letter via email to brian@bhfarr.com.

Thank you for your consideration. I look forward to working together.

Signature _____

Printed Name _____

Date _____