



NEW CLIENT WELCOME KIT

COACHING SERVICES – MANDA TURETSKY, MS, MBA, EDS

COACHING AGREEMENT AND INFORMED CONSENT

Welcome to Success Narratives, LLC!

You've taken an important first step on your journey by choosing a professional coach. Please read this Agreement carefully and raise any questions or concerns before you sign it. You can reach me at manda@successnarratives.com.

SERVICES

Individual services provided by Manda Turetsky, MS, MBA include in-person Coaching or TeleCoaching (via phone or web) on topics decided jointly with you, the client. Coaching may also be provided in a group setting around a particular topic or issue.

PURPOSE & METHODS

The purpose of coaching is to develop and implement strategies to help you reach personally identified goals of enhanced performance and personal satisfaction. Coaching may address specific personal projects—life balance, communication skills, relationships, job performance, career satisfaction—or general conditions in your life or profession.

Coaching utilizes tools such as personal strategic planning, values clarification, brainstorming, motivational interviewing, and other consulting & counseling techniques.

COACHING VS. COUNSELING

Please note that while I am a fully trained professional mental health counselor, coaching services are **not** psychotherapy. Both are beneficial and supportive modalities that help bring out the best in my clients and enrich their lives, and both are valuable and important services. They are, however, fundamentally different services and mutually exclusive—that is, your coach cannot be your psychotherapist and your psychotherapist cannot be your coach.



Although both coaching and psychotherapy use knowledge of human behavior, motivation, behavioral change, and interactive counseling techniques, there are major differences in the goals, focus, and level of professional responsibility.

The differences I consider most important in my practice are:

- Coaching is goal-oriented, active process, designed to address issues in which the client is ready and able to take an active role.
- Coaching is a less vulnerable and exploratory modality than psychotherapy, focused on action and skill-building rather than diagnosis, treatment, or deep understanding of psychological issues.
- While coaching can supplement psychotherapy (with communication between coach and therapist), coaching alone is NOT appropriate for the treatment of anxiety, depression, trauma, grief, PTSD, or other mental health disorders.
- Coaching may not be reimbursable by health insurance.

As your Coach, my job is to help you to take information and skills that you already have and (1) to make decisions about changes you would like to make (including a list of coaching targets/goals) (2) to develop a personal action plan for making those changes, (3) to implement your action plan and make the behavioral changes, and (4) to develop strategies to maintain the changes you have made. I will support, encourage, teach, and help you stay "on track" toward your goals.

You, as the Client, set the agenda for your coaching, and your success will depend on your willingness to define and take risks and try new approaches. You can expect your Coach to be honest and direct, asking straightforward questions and using challenging techniques to help you move forward. You are expected to evaluate your own progress, and if the coaching is not working as you wish, you should immediately inform me so we can both take steps to correct the problem. Like any human endeavor, coaching can involve feelings of distress and frustration that accompany the process of change. Coaching does not offer any guarantee of success.

For your safety and in accordance with my professional ethics, I will pause or terminate coaching if it appears that psychotherapy would better address the issues brought to coaching. If at any time during our work together, you feel that you would benefit from a more therapeutic relationship or a higher level of care, please let me know immediately and I will assist you with finding an appropriate psychotherapist.

CONFIDENTIALITY

As your coach, I will protect the confidentiality of our sessions to the best of my legal ability. I will only release information about our work to others with your written permission, or if I am required to do so by a court order. There are some situations in which I am legally obligated to breach your confidentiality in order to protect you or others from harm, including (1) if I have information that indicates that a child or elderly or disabled person is being abused, I must report that to the appropriate state agency and (2) if a client is an imminent risk to him/herself or makes threats of imminent violence against another person, I



am required to take protective actions. These situations rarely occur in coaching practice, but if such a situation does occur, I will make every effort to discuss it with you before taking any action.

THE COACHING RELATIONSHIP

While both psychotherapy and coaching relationships are supportive and positive, and can sometimes feel comfortable like a friendship, it is important to understand that they are not friendships in the traditional sense. The boundaries of the professional relationship are uniquely designed to create a safe, unfettered space for you, the client, to create positive change in your life. The benefits derived from the coaching relationship can be diluted or even counterproductive if these boundaries are not preserved.

Psychotherapists are discouraged by the Code of Ethics from forming or allowing “dual relationships” with clients (i.e. treating someone in therapy with whom the therapist has a previous or existing social or professional relationship outside of therapy). Among other things, this is for the protection of the client's confidentiality as well as the client's emotional safety within the therapeutic relationship and the community. The same principles apply to the coaching relationship.

*Exception for Career Coaching: since it is typically a less vulnerable and sensitive process, I sometimes make an exception to the dual relationships policy for career coaching. (For example, working with a former business contact to change careers or start a new business). In these cases, we will discuss the nature of our dual relationship at the outset of coaching, and determine the parameters of our coaching relationship carefully to delineate it from an existing social or professional relationship. **Clients should be aware that the risks of incidental disclosure or discomfort may be higher when a dual relationship exists.***

If you have any questions about the client-coach relationship, please ask me before our sessions begin.

FEEDBACK

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

ADMINISTRATIVE POLICIES

LOCATION OF SERVICES

Coaching services are provided in three locations: (1) at my office, located at 1755 Woodstock Rd., Suite 200, Roswell, GA 30075, (2) online via Skype, GoToMeeting or another similar video client, or (3) via phone.

Some clients prefer the convenience of meeting in-person at another location, such as a coffee shop, the client's office, or another mutually agreeable location. This option is only available when my schedule allows, and generally is only offered on days when I am not in my Roswell office. When the option is available, client will pay a minimum of one hour travel time plus mileage in addition to each



session fee. I encourage clients who are considering a public meeting place to consider carefully the issues of confidentiality (which cannot be guaranteed in any public setting) and other potential repercussions of meeting in public. I strongly discourage this practice when coaching revolves around any sensitive employment or personal issues.

PAYMENTS & FINANCIAL POLICIES

Standard coaching fees are set at \$120 per 50-minute call or meeting. Shorter, check-in only sessions (20 minutes or less by phone, or check-in via email) must be arranged in advance, and are billed at \$45 per 20 minutes or per email interaction. When relevant, travel time is billed at \$50 per hour, and mileage is billed at \$0.55/mile, plus any incurred travel expenses. The fee for each session will be due at the beginning of the session. I accept cash, personal checks and most major credit cards in person, as well as credit cards or bank transfer via PayPal.

ALL clients agree to keep a valid credit card on file with Success Narratives, LLC, which may be charged for sessions if desired. **This card will also be charged to cover cancellation fees for any missed sessions not canceled within 24 hours.** Please note that there is a \$35 fee for returned checks, and that any amount incurred due to a returned check will be automatically charged to the credit card on file.

Any changes to these financial procedures must be mutually agreed upon in writing.

SCHEDULING

Coaching is scheduled at the mutual convenience of the Coach and the Client. The day and time for the next meeting or call will be scheduled at the close of each coaching session. Clients may also request appointments by leaving a message or via email at manda@successnarratives.com. Please wait for a reply to confirm.

Cancellations: In the event that you are unable to keep an appointment, please notify me at least 24 hours in advance. If such advance notice is not received, you will be financially responsible for the session you missed, charged to the card on file. Repeated cancellations without adequate notice will be brought up as a topic for discussion in coaching, and if not remedied, may be cause for termination of coaching services.

LEGAL RISKS, RIGHTS & DISCLAIMERS

RISKS TO THE CLIENT

All helping relationships come with inherent risks along with potential rewards. If at any time you feel unsafe or vulnerable to crisis, **please call 911 or go to your local emergency room.** You may also contact the **Georgia Crisis and Access Line at 1-800-715-4225.**

Every effort will be made to maintain the confidentiality of our coaching relationship and the content of our sessions. However, it is impossible to fully protect the confidentiality of information that is transmitted



electronically. This is particularly true of email and information stored on computers connected to the internet (unless you utilize encryption and other forms of security protection), and if you use a cordless or cell phone, someone with a scanner could hear you talk. I encourage clients to be mindful of the information they send via electronic means and reserve sensitive information for in-person meetings.

Public meeting spaces: Occasionally I work with clients who prefer to meet in a public space such as a coffee shop or their place of employment. Please note that meeting in a public place jeopardizes any confidentiality

MUTUAL NONDISCLOSURE

The Coach and Client mutually recognize that they may discuss future plans, goals, personal relationships, and other private information. The Coach will not voluntarily 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 parties. This includes photocopying worksheets or other materials without written permission, sharing those materials with others (with or without remuneration) and/or posting such information online.

DISPUTE RESOLUTION

Conflict is a natural part of the human experience. Sometimes minor disagreements between a client and coach can be an opportunity to explore communication styles and build skills in a safe environment (for example, to practice assertiveness skills by expressing your needs politely and firmly to your coach). Regular or substantive conflict, however, may be a sign of poor fit in the coaching relationship, or a need for more elevated care. In such cases, we will work together to determine the best strategy for us both.

In the extremely rare circumstance that a dispute cannot be resolved between us, both parties agree that dispute—including any controversy or claim arising out of or relating to this contract, or the breach thereof—shall be resolved by arbitration administered by the International Centre for Dispute Resolution in accordance with its International Arbitration Rules. The location of said arbitration will be Fulton County, Georgia, United States.

SIGNATURE

Your signature below indicates that you have read and understood the **Coaching Agreement and Informed Consent** and agree to abide by its terms.

Client Printed Name: _____ Date: _____

Client Signature: _____

(If Applicable) Parent's or Legal Guardian's Name: _____ Date: _____

Parent's or Legal Guardian's Signature: _____



CLIENT NOTIFICATION OF PRIVACY RIGHTS

The Health Insurance Portability and Accountability Act (HIPAA) affords client protections related to the electronic transmission of data ("the transaction rules"), the keeping and use of client records ("privacy rules"), and storage and access to health care records ("the security rules"). HIPAA applies to all health care providers, including mental health care. Providers and health care agencies throughout the country are now required to provide clients a notification of their privacy rights as it relates to their health care records.

Please visit this link to read this important document:

http://www.successnarratives.com/uploads/1/2/1/8/121837136/hipaa_privacy_protection_notice_-_success_narratives.pdf

Clients may access this privacy protection policy at any time by following the link above, or by requesting a paper copy in the office.

In mental health care, confidentiality and privacy are central to the success of the relationship and as such, I will do all I can to protect the privacy of your mental health records. If you have any questions about this document, please do not hesitate to ask me for further clarification.

By law, I am required to secure your signature indicating you have received the Privacy Protection Notice Document. Thank you for your thoughtful consideration of these matters.

Manda P. Turetsky, MS, MBA, EdS

I, _____, understand and have been provided a copy of the Client Notification of Privacy Rights Document which provides a detailed description of the potential uses and disclosures of my protected health information, as well as my rights on these matters. I understand I have the right to review this document before signing this acknowledgment form.

Client Signature or Parent if Minor or Legal Charge

Date

If Legal Charge, describe representative authority: _____



NEW CLIENT INFORMATION – COACHING ONLY

Today's Date _____ Preferred Name _____ Preferred Pronoun(s) _____

Full (Legal) Name _____ Date of Birth _____

Home Address _____ City _____ Zip _____

May I send information to this address? Yes No
If No, please provide an address where information can be mailed:

| Phone Type | Number | May I contact you at this #? | | |
|------------|--------|------------------------------|----|-----------|
| | | Yes | No | Disguised |
| Mobile | | | | |
| Work | | | | |
| Home | | | | |

Person to notify in case of emergency _____ Phone _____

I will only contact this person if I believe it is a life or death emergency. Please provide your signature to indicate that I may do so: _____

How did you hear about Success Narratives? _____

HEALTH CONTEXT

Please explain any significant medical issues, recent life changes, family or career concerns that might impact your coaching:

Do you smoke or use tobacco? Yes No If yes, how much per day? _____
 Do you consume caffeine? Yes No If yes, how much per day? _____
 Do you drink alcohol? Yes No How much _____ per day /week / month?
 Do you use any illicit drugs? Yes No If yes, which? _____
 Do you exercise? Yes No If yes, how often? _____ Have
 you ever talked with a professional coach or mental health professional before today? Yes No
 If yes: Date(s) Reason



GOALS & STRATEGIES

What are your primary goals for coaching?

What do you see as your strengths?

What strategies are you already employing (or have you previously tried) to make progress toward your goals?

Do you typically learn best by...?

Reading Visual Presentations Listening Conversation Activities Role Play

How many sessions do you plan to invest in the coaching process?

1-5 6-10 11-20 20+ I don't know

CAREER CONTEXT

Education Level Completed _____ Major/Specialty _____

Current Occupation _____

Current Employer _____

What do you enjoy or find satisfying about your current career?



What would you change if you could?

RELATIONSHIPS & SOCIAL SUPPORT

Are you currently in a relationship? Yes No If yes: Married Partnered
How long in current relationship? _____

Please rate your current relationship satisfaction: 1 2 3 4 5 6 7 8 9 10

Any previous marriages/significant relationships? Yes No

Do you have children? Yes No If yes, please list names & ages:

Please list other people or groups who are important social support for you:

Is spirituality an important part of your life? If so, what would you like me to know?

Any additional information you would like to include:
