



**Beantown Money**  
Your Personal Finance Coach

## **BEANTOWN MONEY FINANCIAL COACHING AGREEMENT**

Thank you for making the Beantown Money Financial Coaching Team part of your financial plan. We look forward to serving you! To help guide our relationship, please review the information below.

### **SCHEDULING APPOINTMENTS**

To schedule an appointment, please contact us or schedule online at [beantownmoney.com](http://beantownmoney.com). We understand that your time and resources are extremely valuable, so we ask that you honor your scheduled appointment time. If you need to reschedule, just let us know in advance. Appointments can be conducted in person, over the phone, or via video conference.

### **SPOUSAL PARTICIPATION**

If you are married, both spouses are encouraged to participate and commit to all scheduled coaching sessions.

### **GROUP COACHING**

If you purchase a group coaching session, you are responsible for attending that session or group of sessions. If you do not attend, no refunds will be issued. A credit for a future session may be available at our sole discretion.

### **REFUND POLICY**

We do not offer refunds for our coaching services as we are a fee-for-time service. We promise that you will get out of the coaching session what you put into it. If you subscribe to a monthly plan, you are responsible for scheduling your monthly session. If you do not schedule a session in a month, you will still be charged. If you are unable to schedule, please contact us prior to the end of the month and we will do our best to accommodate all reasonable requests at our sole discretion. Monthly coaching plans include your session as well as communication throughout the month, therefore once a month begins are not eligible for a refund for that month. See "Modifying Service Plans" below.

### **COACHING SERVICES**

We assume the responsibility of understanding and evaluating your current needs, goals, and resources in order to develop a strategy to meet your objectives. However,

in order to make your plan work, we expect that you will come prepared to take the steps necessary to succeed, take full responsibility for your plan and its implementation, and contact us when you need additional advice and direction.

### **PAPERWORK**

You are asked to complete preliminary paperwork to better prepare your coach. We ask that these forms be filled out to the very best of your knowledge and ability prior to your scheduled appointment. You assume all responsibility for providing accurate and complete materials, documentation, and facts upon which our coaching may be based.

### **RESCHEDULING APPOINTMENTS**

Please contact at least 24 hours prior to cancel or reschedule a session. Modifications less than 24 hours in advance are subject to a \$100 fee. This applies to both consultations and member sessions.

### **MODIFYING SERVICE PLANS**

If you would like to modify your service plan, please communicate that during your next scheduled session. If you are enrolled in a monthly plan, you must complete your next session and communicate your desire during the meeting so that we can plan accordingly.

### **CONFIDENTIALITY POLICY**

We will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to us or we generate. We will reveal such matters only upon receipt of a written authorization and clear, verifiable instructions from you telling us exactly what we may reveal.

### **DISCLAIMER**

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. We are not authorized to provide and communication should not be construed to be legal, accounting, investment, or other professional advice. Since your situation is fact-dependent, you must additionally seek the services of an appropriate licensed legal, accounting, or investment service.