

## Harmony for Life ® Coaching & Consulting Partnership Agreement

Welcome to Harmony for Life ®! We look forward to working in partnership with you. **In addition to completing and submitting the Client Information Form (also available on our website), please complete this online Coaching & Consulting Partnership Agreement Form and submit it back to us via e-mail (Info@harmonyforlife.com) before our first coaching or consulting session together.** Upon request, we can send you this form and receive it from you via US or Worldwide Air Mail. We encourage you to make photocopies for your records. We retain all original client forms in a secure, locked location at our home office.

### Wherever You Are, We'll Meet You There: Program & Service Locations

In addition to offering in-person coaching, consulting, and specialty programs and services to people and businesses in our Tucson, AZ USA-based location or upon request, at clients' locations, Harmony for Life ® provides telephonic and Internet-based programs and services to clients worldwide. All sessions are scheduled during flexible hours, with clients participating in the privacy and comfort of their own home, office, or a conveniently chosen location.

### About Coaching

Coaching focuses on where you are and where you want to be. Coaching does not involve diagnosing, treatment, therapy, or emphasis on pathology, illness, or disease. Unlike clinical practitioners, both coaches and consultants can work with clients they know personally. Based on a wholeness model, coaching presumes clients' innate ability to co-create success and self-generate solutions. Coaching clients establish their own agenda and personal or professional measures for success. Your coach provides clarity, support, and accountability to assist you in realizing and experiencing catalytic change.

With coaching, you define your goals, what it would be like to experience and achieve them, as well as identify and evaluate obstacles to your success. Most important, you will identify and evaluate what motivates and inspires you to success, taking action to move forward and remove obstacles accordingly. Coaching involves evaluating, maintaining, and nourishing your success with ongoing e-mail or in-person support.

### About Consulting

Consulting focuses on assisting clients in making customized, major, transformative changes or "overhauls," when their current life or business situation or circumstances require more than the "fine tuning" offered by coaching. Always solution focused, even when assessments are performed and recommendations are made, consulting relies heavily upon client insights and contributions.

With consulting, your consultant assesses you and/or your business—where you are in your current situation, where you want to be—and why, followed by your own self-assessment. You

then will receive a recommendation based upon both your consultant's, as well as your own, assessments of the situation and its potential for forward movement and transformation. Consulting presumes a partnership for action plan implementation, utilizing customized specialty services for your unique client needs. Consulting involves evaluating, maintaining, and nourishing your success with ongoing e-mail or in-person support.

## **Delivery of Programs & Services**

Coaching, consulting, and associated specialty programs and services are available via telephone, Skype, e-mail, on site at your office or location, or off site by arrangement. Methods of engagement for success include take-home exercises, between-session e-mail support, and customized e-newsletters.

## **Policies and Procedures for Coaching & Consulting**

The coaching or consulting partnership is a relationship that works in part because of clearly defined rights and responsibilities held by each party. This framework helps to create the safety to take risks and the support to become empowered to make catalytic changes.

As our client, you have certain rights that are important for you to know about because this professional coaching or consulting experience belongs to you. In addition, there are certain limitations to those rights of which you need to be aware. As your coach or consultant, Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach and Harmony for Life ® have corresponding responsibilities to you.

## **Our Responsibilities to YOU**

### **Confidentiality, Exceptions, and Record Keeping**

We are committed to confidentiality in our work together. Please note, however, that there are certain exceptions to confidentiality as mandated by law and/or professional/ethical guidelines, as mentioned below. We cannot and will not tell anyone else what you have told us, or even that you are a client working with us without your prior written permission.

You may direct us to share information with whomever you choose (such as other related professionals/colleagues, or healthcare providers), and you can change your mind and revoke that permission at any time. You also may request anyone you wish to attend or participate in a coaching or consulting session with you.

The sharing of your confidential information will only take place after you have completed, dated, and signed the specific **Client Consent for Release of Information Section** of this form, authorizing your permission to exchange or share specific information. This section will specify the nature of the information to be disclosed, the person authorized to disclose the information, to whom the information may be disclosed, and the specific purposes for which the information may be used, both at the time of disclosure and at any time in the future.

Very rarely, during complex client situations, we may find it helpful to consult with other colleagues; we do not reveal the identities of clients. The other professionals with whom we consult also are legally bound to keep this information confidential.

In the **Client Information Form—Contact and Billing Authorization Section**, you have the opportunity to specify the method by which you prefer to be contacted and how we can leave you a confidential message if unable to reach you directly. In addition, you will designate a contact person or place to contact in case of emergency.

If you elect to communicate with us by e-mail at some point in our work together, All e-mails are retained in the logs of your or our Internet service provider. Any correspondence between us is retained in both hard copy for your client file, as well as in an online Harmony for Life ® folder, accessible only to Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach. This being said, though, **please be aware that technically speaking, e-mail is not completely confidential**. While under normal circumstances, no one looks at these logs, they are, in theory, available to be read by the system administrator(s) of the Internet service provider.

Harmony for Life ® and Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach offer clients professional coaching and consulting programs and services in compliance with the ethical standards set forth by the International Coach Federation (ICF) and International Association of Coaches (IAC). As a Licensed Psychologist (LP) in the state of Minnesota since 1993, a Licensed Professional Clinical Mental Health Counselor (LPCC) in New Mexico since 2008, and a Licensed Mental Health Counselor (LMHC) in Hawaii since 2011, Ms. Tankenoff completes ongoing continuing professional education and adheres to the ethics and rules of the Minnesota Board of Psychology, the New Mexico Counseling and Therapy Practice Board, and the Hawaii Counseling and Mental Health Board. Please note, however, that Harmony for Life ®'s and Ms. Tankenoff's provision of professional coaching and consulting services does not involve the practice of psychology or psychotherapy.

When you sign this **Coaching & Consulting Partnership Agreement** form, you will acknowledge and certify that you fully understand that you are seeking either/both coaching and/or consulting services, which you understand are not psychological diagnoses or treatments. You also certify that in the scope of providing coaching and consulting services, Ms. Tankenoff and Harmony for Life ® are not performing in the role of psychologist or psychotherapist, do not handle medical or psychological emergencies, and will assist you in finding an appropriate referral source, should psychological/psychotherapeutic support be necessary.

You also agree to release and hold harmless Ms. Tankenoff and Harmony for Life ® from any and all liability for illness, injuries, or death, and for any losses or damages related thereto, however occurring, in relation to your coaching or consulting work. You also recognize and accept all risks and limitations involved in seeking coaching and consulting services.

**The following are examples of exceptions to confidentiality: We will report the following based upon the information that you have communicated about yourself or others:**

If we have reasonable cause to believe that a child (children) or vulnerable adult (adults) is (are) being subjected to abuse, neglect, or exploitation, we must inform the appropriate Child/Family Protective Services and/or Adult Protective Services as soon as possible.

If we have reasonable cause to believe that you present a threat or harm of imminent, serious physical violence against a readily identifiable individual, we must take protective actions, such as attempting to inform that person to warn them of your intentions, contacting the police to ask them to protect your intended victim, or seeking hospitalization for you.

If we have reasonable cause to believe that you present a threat or harm of imminent, serious physical danger to yourself, we will make every effort to discuss this situation with you and to obtain your willingness to take the necessary steps to guarantee your own safety and well-being. If you are unable or unwilling to guarantee your own safety and well-being, we will take the appropriate action of contacting a crisis team, which may include the police or other professionals in your geographical area who can assist in securing your protection or seeking hospitalization on your behalf.

In addition to the aforementioned exceptions to confidentiality, we also may be required to disclose or provide information about you if:

You are involved in a court proceeding and we receive a written authorization from you or your legal representation or a court order.

You file a complaint or lawsuit against us, at which point we will take the necessary steps to defend ourselves.

**For Minors and Parents:** clients under 18 years of age who are not emancipated and their parents should be aware that the law may allow parents to examine their child's coaching or consulting file/records—unless we decide that such access is likely to injure the child, or we (parents and professional coaches) agree (in writing) that parents will not be accessing their child's file/records.

Because privacy in professional coaching and consulting is often crucial to successful progress, particularly with teenagers, we may request a written agreement from parents, whereby they consent to receive only general information about their child's progress and attendance.

We also will provide parents with a summary of their child's coaching or consulting once professional services are completed.

**Record Keeping:** We do keep very brief records, noting only your attendance, topics discussed, and any pertinent points related to your overall goals, progress, and process. You have the right to request a review or copy of your records at any time. Typically, we will ask that we meet or discuss them together, to promote optimal understanding.

The client session and billing records we maintain are the physical property of Harmony For Life®. The information in such records, however, belongs to you.

You also have the right to request that your client records be amended to correct incomplete or incorrect information by delivering a request to us. We may deny your request if you ask us to amend information that is not a part of the information kept by our office, is not part of the information that you would be permitted to inspect and copy, or information that is accurate and complete.

If your request is denied, you will be informed of the reason of the denial and will have an opportunity to submit a statement of disagreement to be maintained with your records.

**Client Rights:** You have the right to be treated with dignity and respect without regard to your race, national origin or culture, religion, spirituality, gender, age, sexual orientation, or disability.

You have the right to participate in Harmony for Life ® programs, knowing that we do not, will not, and cannot have a sexual relationship with any clients whatsoever.

You have the right to ask questions about any aspect of our work together. We always are willing to discuss our approaches and look at alternatives that might work better. We always are open to your suggestions and ideas. If we are not the right fit for your professional coaching or consulting needs, you are free to request that we refer you to someone else and/or end our working partnership at any time.

You have the right to participate collaboratively in our programs as an integral partner, without fear of reprisal. If you are unhappy with any aspect of our work, please let us know so that we can respond to your concerns with care and respect.

You have the right to know that we will respond to all e-mails and voice mail messages as soon as possible. If we are going to be away from the office for an extended period of time, we will inform you well in advance.

Telephone calls or e-mail correspondence of less than fifteen minutes are free. However, if outside of our regularly scheduled session times, we spend more than fifteen minutes per week with you on the telephone, if you leave more than fifteen minutes worth of phone messages per week, or if we spend more than fifteen minutes reading and responding to e-mails from you per week, we may bill you on a prorated basis for that time.

**Client Responsibilities:** You are responsible for commencing your session on time and at the time we have scheduled. All sessions are 50 minutes long, unless we have made arrangements to conduct sessions of a different length. If you are late, we will end on time and not run over into the next client's session.

If you miss a session without canceling, or cancel with less than twenty-four hours notice (and no illness/emergency), Harmony for Life ® reserves the right to bill you for the missed session. For clients receiving in-person sessions in Tucson, AZ USA, we accept payment at the time of service. Otherwise, Harmony for Life ® requires pre-payment for all program services. You are the driving force behind your participation in our programs and services. To further ensure ongoing continuity of care, open communication, and in keeping with our commitment to a "whole person" and "whole business" approach, please inform us if you have experienced, are experiencing, or anticipate that you will experience any significant changes in your health, well-being, or overall circumstances.

## Client Consent for Release of Information Form—If Applicable:

This form, when completed and signed by you, authorizes Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach and/or Harmony For Life® to release and/or receive confidential information/records to and/or from the person/people/ organization you designate.

Please clearly write in your specifications. If you are receiving in-person program services/sessions in our Tucson, AZ USA-based area, the witness signature will take place at that time. Otherwise, we will sign as witness to your submitted signature upon receipt. We encourage you to retain a copy for your records. Thank you.

I, \_\_\_\_\_ for  
minor: \_\_\_\_\_  
(name of client) (name of minor client, if applicable)

authorize only Mari R. Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach and/or Harmony for Life ® to disclose \_\_\_\_\_ /receive \_\_\_\_\_ solely to \_\_\_\_\_ from \_\_\_\_\_ for the purpose of coordinating continuity of care/coaching/consulting work. Specifically, this information is to be communicated via e-mail \_\_\_\_\_, US or Worldwide Air Mail \_\_\_\_\_, Telephone \_\_\_\_\_, or SKYPE/Internet conference \_\_\_\_\_.

\*Federal or state law protects the confidentiality of this information. I understand that I have the right to inspect and copy any written information that is disclosed. This consent is subject to revocation in writing at any time, but such revocation can have no effect on disclosures previously made. In any event, this authorization expires without express revocation upon termination of my participation in programs/services with Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach and Harmony for Life ® or on the date indicated below.

Release expiration date: \_\_\_\_\_

\_\_\_\_\_  
Signature of client  
(or parent/legal guardian of minor client)

Date \_\_\_\_\_

\_\_\_\_\_  
Signature of witness  
(Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach, Owner, Harmony for Life ®)

Date \_\_\_\_\_

## Client Informed Consent/Acknowledgment of Harmony for Life ®'s Coaching & Consulting Partnership Agreement Form

*I have read this Coaching & Consulting Partnership Agreement Form and understand the policies and procedures set forth by Harmony for Life ® and Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach. Specifically, I understand my rights and responsibilities as a coaching or consulting client and participant, as well as Ms. Tankenoff's and Harmony for Life ®'s responsibilities to me. I agree to participate in coaching or consulting and know that I can end professional services at any time. I also agree to pre-pay for all services, unless I am receiving in-person sessions in the Tucson, AZ USA area, with such sessions payable at the time of service. I am over the age of eighteen.*

Client E-Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent or Legal Guardian E-Signature (if applicable)\_\_\_\_\_

Harmony for Life ®/Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach Signature, Upon Receipt of Client's E-Signature

\_\_\_\_\_  
Date\_\_\_\_\_

**NEXT STEPS... Please e-mail this form back to us: [Info@harmonyforlife.com](mailto:Info@harmonyforlife.com). Please take care to do the same with the Client Information Form, also available on our website.**

Yours, in Harmony for Life ®,

Mari Tankenoff, MA, LP (MN), LPCC (NM), LMHC (HI), CC-Coach Training Alliance Certified Coach, Owner, Harmony for Life ® Coaching & Consulting for People & Businesses Worldwide  
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