



Aspire Financial Coaching Agreement

Thank you for choosing **Aspire Financial Coaching** to support your financial journey, we are committed to helping you achieve your goals. Please review the following terms to guide our coaching relationship.

Coaching Services

Our responsibility is to understand your current financial situation, goals and biggest needs. We will work together to create a personalized action plan to empower you with the tools, knowledge and strategies to make informed decisions, develop habits, mindset and skills that help achieve those goals. Your responsibility is to actively participate, implement agreed-upon steps, and provide accurate and complete information necessary for effective coaching. We are committed to delivering value; however, your level of engagement will influence your results. Please note that we do not guarantee any specific outcomes.

- **Coach's Role & Limitations-** Your coach will guide and support you in your financial journey but will not make decisions for you or guarantee specific outcomes. Coaching is not a substitute for legal, accounting, or investment advice. You will make all financial decisions independently and assume full responsibility for those decisions.
- **Spousal Participation-** If you are married, we strongly recommend both spouses participate in all scheduled coaching sessions.
- **Paperwork-** To prepare for your session, please complete all preliminary paperwork to the best of your ability before your appointment. You are responsible for providing accurate and complete information.
- **Disclaimer-** Aspire Financial Coaching does not provide legal, accounting, or investment advice. For such services, please consult a licensed professional.

Scheduling Appointments

Appointments can be scheduled through [Aspire Financial Coaching Scheduling](#) and are conducted by Zoom video conferencing.

- **No-Show Policy-** Sessions missed without at least 24-hour advance notice may be forfeited.
- **Rescheduling Appointments-** If you need to reschedule, you must provide at least 24-hour advance notice.

Payment Terms

All sessions must be paid in advance. If payment is not received prior to your scheduled session, the session will need to be rescheduled.

- **Session Expiry Policy -** Pre-purchased sessions must be used within 12 months of purchase. Unused sessions after this period will expire and are non-refundable.
- **Refund Policy -** Aspire Financial Coaching operates as a fee-for-time service. We do not offer refunds for coaching sessions.

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. All updated policies are available on our website www.aspirefinancialcoaching.com

By engaging in our services and scheduling your sessions, you acknowledge and accept these terms.