



*Tom Hart*  
**SUCCESS SERIES**  
Seminars & Coaching

## Coaching Questionnaire & Agreement

Thank you for your interest in receiving life coaching from **Tom Hart, one of the profession's leading Success Strategist and Master Coaches.** Tom has been providing Executive Coaching to business professionals, corporate executives, small business owners, and entrepreneurs and Life Coaching to family office, high net worth, and private individuals **for over 13 years with consistent, enduring transformative results.**

As your Coach, Tom motivates and guides you through experiential exercises to uncover your core beliefs which are creating the reality of your life. He then helps you plan ways to make positive changes in identified areas. He will call it like it is and challenge and motivate you to take ownership and affect transformational change in your life. But mostly, as a Coach, Tom listens—really listens—with empathy and mindfulness and without judgment, both to what you are saying and what you are NOT saying. And as he is listening, Tom is scanning his internal reservoir of enlightenment principles to find the few that would best apply to your situation. He will then collaborate with you to clarify your goals and create a **Personal Strategic Plan** for their achievement.

Tom's life experience has brought him through the real world of personal and professional meltdowns and resurgences in tough times which always required innovation and collaboration and sometimes included losing it all and coming back bigger and stronger. Tom is committed to helping people learn how to "thrive through" life's challenges and how to accelerate the achievement of their personal and professional goals to create their new powerful and inspired life. As a champion of transformational living, Tom integrates specific methodologies and results-oriented activities into his presentations to help his audiences take on greater challenges and produce breakthrough results.

The techniques Tom uses allow you to communicate directly with your subconscious mind to **assist you in making transformative changes easily, effectively and permanently.** To create this lasting change Tom uses proven methodologies combined with his decades of applying timeless success principles in a daily walk to personal and professional success. Coaching sessions are held globally over the phone, via Skype/FaceTime, or in person in Los Angeles, Denver, Dallas and Kansas City.

The world's most successful individuals, business executives and entrepreneurs utilize a mentor or coach. Now you have the opportunity to perform at your best in each of life's seven areas:

physical      professional      relational      financial  
spiritual      philanthropical      personal

**workshops**  
700 N Colorado Blvd, Suite 102, Denver, CO 80206 | 720.373.6100 | 877.829.6656 | THart@SuccessSeriesLLC.com

**Tom Hart** Success Strategist ▪ Master Coach ▪ Speaker  
**executive and life coaching**  
**business advisory**  
LA ▪ DENVER ▪ DALLAS ▪ KC  
[www.SuccessSeriesLLC.com](http://www.SuccessSeriesLLC.com)



Please take a few moments to fill out the following questionnaire, it is not mandatory (but it will help me learn more about you prior to our first visit), however, the *Coaching Agreement* section will need to be signed prior to our first consultation. All forms are confidential and are submitted directly to my personal email.

Congratulations! You have already begun your transformational journey just by contacting me, please let me be of further assistance. Your authentic life is waiting for you. Grow Your Life...Now!

**When completed, please email or fax this document to me personally at:**

Tom Hart Success Series Seminars & Coaching  
THart@SuccessSeriesLLC.com  
Fax: 877.829.6656

Please read all questions before beginning to answer.

1. Please provide your Contact Information  
  
Name:  
Street Address, City, Zip, Country:  
Phone Number:  
E-mail Address:  
Fax Number:  
Website/Blog:  
Best time for me to reach you:  
Life Roles (ie: wife, mother, attorney, cyclist, traveler):
2. What would you like to work on in coaching?
3. What do you want to obtain from this coaching relationship?
4. Which of the seven life areas are you wanting to advance (can be more than one)?
5. What are your personal strengths? Weaknesses?
6. What was your greatest achievement last year? Greatest disappointment?



7. What energizes and excites you? What are you passionate about?
  
8. What is most fulfilling about your life today? What is most disappointing? What is missing?
  
9. What vision do you have for your life?
  
10. What support are you presently receiving to achieve your life's goals?
  
11. What will your life be like when you are in "the flow" consistently fulfilling your desires?
  
12. Why is NOW the right time for you to transform your life?
  
13. On a scale of 1 to 10 (10 being 100% committed), how committed are you to working at making your desired changes?
  
14. Please tell me about significant events in your life?
  
15. Is there any additional information that you would like to share with me?



### Coaching Agreement

**Description:** Coaching is an alliance between the Coach and the Client in a thought-provoking and creative process whereby the Coach facilitates and inspires the Client to discover and maximize personal and professional potential.

#### Responsibilities:

1. Coach agrees to maintain the ethics and standards of behavior set by the International Coach Federation (ICF), [www.coachfederation.org/ethics](http://www.coachfederation.org/ethics).
2. Client is responsible for creating and implementing his/her own physical, mental and emotional well-being, decisions, choices, actions and results. As such, the Client agrees that the Coach is not and will not be liable for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Client understands that coaching is not to be used as a substitute for professional advice by legal, mental, medical, money management or other qualified professionals and will seek independent professional guidance for such matters. If Client is currently under the care of a mental health professional, Coach will recommend that Client inform the mental health care provider.
3. Client agrees to communicate honestly, be open to feedback and assistance and create the time and energy to participate fully in the process.

**Services:** The parties agree to engage in a(n) \_\_\_\_\_ month Coaching Program through phone, Skype or in-person meetings. Coach will be available to Client by e-mail and voicemail in between scheduled meetings as defined by the Coach. Coach may also be available for additional offline time, per client's request on a prorated basis rate of \$150.00 per hour (for example, reviewing documents, reading or writing reports, engaging in other client related services outside of coaching hours).

**Schedule & Fees:** This Coaching Agreement is valid as of \_\_\_\_\_ (date). The fee is \$150.00 per one-hour session or \$375.00 for three (3) sessions per month (when scheduled and paid for in advance).

**Procedure:** The time of the coaching meetings and/or location will be determined by Coach and Client based on a mutually agreed upon time. The Client will initiate all scheduled calls and will call the Coach at the following number for all scheduled meetings: (720) 373-6100. If the Coach will be at any other number for a scheduled call, Client will be notified prior to the scheduled appointment time.

**Confidentiality:** This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship, is bound to confidentiality by the ICF Code of Ethics but is not considered a legally confidential relationship (like in Medicine or Law). The Coach agrees not to disclose any information pertaining to the Client without the Client's written consent. The Coach will not disclose the Client's name as a reference without the Client's consent. Confidential information does not include information that: (a) was in the Coach's possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client's industry;



(c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client's confidential information; or (e) that the Coach is required by law to disclose. According to the ethics of the Coaching profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, further coach professional development and/or consultation purposes.

**Cancellation Policy:** Client agrees that it is the Client's responsibility to notify the Coach twenty-four (24) hours in advance of the scheduled calls/meetings. Coach reserves the right to bill Client for a missed meeting. Coach will attempt in good faith to reschedule the missed meeting.

**Termination:** Either the Client or the Coach may terminate this agreement at any time with thirty (30) days written notice.

**Limited Liability:** Except as expressly provided for in this agreement, the Coach makes no guarantees or warranties, express or implied. In no event will the Coach be liable to the Client for consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach's entire liability under this agreement, and the Client's exclusive remedy, will be limited to the amount paid by the Client to the Coach under this agreement for all services rendered up until the termination date.

This is the entire agreement of the parties, and reflects a complete understanding of the parties with respect to the subject matter. This agreement supersedes all prior written and oral representations.

If a dispute arises out of this agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to thirty (30) days after notice given. If the dispute is not resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.

Thank you! Please sign this Coaching Agreement where indicated prior to our first scheduled coaching meeting and email or fax a copy to me personally at the following; I will then sign and return a copy to you for your records:

Tom Hart Success Series Seminars & Coaching  
Email: THart@SuccessSeriesLLC.com  
Fax: 877.829.6656

AGREED & ACCEPTED

\_\_\_\_\_

\_\_\_\_\_

By \_\_\_\_\_ (Client)

By Tom Hart (Coach)

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ADAPTED FROM ICF STND FORM 2010

