

Murray Financial Group, LLC Coaching Agreement

Coaching Agreement

Initial Consultation: Free 45- minute consultation.

Coaching Fees and Services: To get started with Murray Financial Group, there is a 1-time Start-Up fee of \$99.00. This fee covers your exclusive financial fitness plan and your first session which is 60 minutes. **This fee is non-refundable and must be paid at least 5 business days before your scheduled session.**

We offer a low monthly rate of \$70.00 which includes 2 30-minute coaching sessions per month.

Monthly session #1 is for planning, goal setting & financial advice

Monthly session # 2 is for working sessions - you work on your goals & tasks & I provide guidance

You can request additional coaching sessions for \$30.00

At the first coaching session, together with you: I will work diligently to understand and evaluate your current budget, goals, and resources; begin developing a strategy to meet and exceed your goal; and recommend specific course of action we believe you should take.

All coaching will be subject to these general policies:

Cancellations: I request cancellations be made at least one business day prior to scheduled appointment. I ask you to provide in advance – a Financial Wellness Assessment & a signed coaching agreement. These must be received in my office two full business days in advance of your scheduled appointment.

If any requested materials, documents, or information is not submitted within that time frame, we may reschedule your coaching session.

You assume all responsibility for providing accurate and complete materials documentation, and facts which our coaching may be based. These documents include a Financial Wellness Assessment and a signed Coaching agreement. I ask that you track your finances and share this information with me. Use either Quicken, YNAB, Simplifi, Every Dollar, Quick books or a shared spreadsheet updated at least weekly.

Payment Policy is as follows: All Plans are paid in advance. By debit (on my website), credit card (on my website or cashier check).

Refund Policy: Upon completing the initial coaching agreement and payment, your consultations for service will commence. I do not offer refunds for coaching services because I am a fee-for-time service. However, if you do not want to continue services and submit it in writing, I will give a discounted refund for only the future service.

Appointment Cancellation Policy: 24-hour notice. If no notice is given you will be charged a cancellation fee of one half our normal rate of \$35.

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My confidentiality policy is this: All matters discussed, facts revealed, and the nature and content of all documents you have provided to me or that we generate will be kept confidential. I will reveal such matters only upon receipt of a written authorization and clear, verifiable instructions from you telling us exactly what I may reveal.

My only disclaimer is this: It is important that you understand and make your own choices I am not a CPA, CFP or licensed investment professional. Information is provided with the understanding that the coach is not engaged to render legal, accounting, taxes advise, investment advice or other professional advice. Since your situation is fact dependent, you must seek the advice of an appropriate licensed legal, accounting or investing services.

I can, and do, promise you this: I will tell you what I believe you need to hear; I will offer a plan with clear direction; I won't give up on you, and I will be available to you.

I expect, and assume, this promise from you: That you will come prepared to make the sacrifices necessary to succeed; do what you need to do to understand the plan and recommendations; take full responsibility for your plan and its implementation; take the action required to meet your goals; and contact me when you need additional advice and direction.

Sign here: _____

Date: