

BETTINA LEHNERT PHD, PLLC
10149 N 92ND ST, SUITE 103
SCOTTSDALE, AZ 85258-4557
480.285.7011 OFFICE 480.767.1730 FAX

PRIVATE & CONFIDENTIAL - CLIENT INFORMATION

TODAY'S DATE _____

NAME (LAST, FIRST, MIDDLE INITIAL) _____

BIRTH DATE ____-____-____ AGE ____ GENDER ____M____F

ADDRESS _____ CITY _____ STATE ____ ZIP _____

HOME TELEPHONE (____) _____ WORK TELEPHONE (____) _____

CELL PHONE (____) _____ E-MAIL _____

MARITAL STATUS: ____MARRIED ____SINGLE ____WIDOWED ____DIVORCED ____SEPARATED ____#OF YEARS

NAME OF SPOUSE / SIGNIFICANT OTHER: _____

MAY WE CONTACT THEM IF NECESSARY? _____

YOUR OCCUPATION _____

REFERRED BY _____ PHONE (____) _____

ADDRESS _____ CITY _____ STATE ____ ZIP _____

MAY WE BE IN CONTACT WITH THE REFERRAL SOURCE? ____Y ____N

EMERGENCY CONTACT _____ RELATIONSHIP _____

TELEPHONE (____) _____ OTHER TELEPHONE (____) _____

BILLING/RESPONSIBLE PARTY INFORMATION

NAME (LAST, FIRST, MIDDLE INITIAL) _____

ADDRESS _____ CITY _____ STATE ____ ZIP _____

HOME TELEPHONE (____) _____ WORK TELEPHONE (____) _____

CELL PHONE (____) _____ E-MAIL _____

CREDIT CARD NUMBER: _____ EXPIRATION: _____

BILLING ZIP CODE: _____ SECURITY CODE _____

COACHING AGREEMENT
Bettina Lehnert, Ph.D., PLLC
10149 N. 92nd St. Ste 103
Scottsdale, AZ 85258
480.285.7011

Welcome to my coaching practice. This document and attachments constitute a contract between us (the "AGREEMENT") and you should read it carefully and raise any questions and concerns that you have before you sign it.

The services to be provided by Dr. Bettina Lehnert are coaching or tele-coaching as designed jointly with the client. The fee for the initial assessment is \$225. and once a plan is agreed upon, coaching sessions will be charged at the rate of \$200. per hour. Professional time spent outside of coaching sessions, including, but not limited to, between-session phone calls or email exchanges, and reading or reviewing documents, will be billed on a prorated basis rounded up to the nearest tenth of an hour. If I am required to attend meetings outside of my offices, you will be charged for all time I spend traveling to the location of such meetings. Fees for coaching sessions must be paid in advance by credit card by the first day of the month in which they are provided unless an alternative arrangement is agreed to. You must also pay for collateral services within 30 days of billing. You are required to give [48] hours notice if you need to cancel or change the time of an appointment. Otherwise, you will be charged for the session in full. Dr. Bettina Lehnert agrees that every effort will be made to reschedule sessions which are cancelled in a timely manner.

Coaching & Psychotherapy

In addition to being a coach, I am also a psychologist licensed in Arizona and California with training and experience in diagnosing and treating emotional problems. (My license in California is on inactive status, as I reside and practice psychology in Arizona.) While there are some similarities between coaching and psychotherapy, they are very different activities and it is important that you understand the differences between them. Psychotherapy is a health care service and is usually reimbursable through health insurance policies. This is not true for coaching. Both coaching and psychotherapy utilize knowledge of human behavior, motivation and behavioral change, and interactive counseling techniques. The major differences are in the goals, focus, and level of professional responsibility.

The focus of coaching is development and implementation of strategies to reach client-identified goals of enhanced performance and personal satisfaction. Coaching may address specific personal projects, life balance, job performance and satisfaction, or general conditions in the client's life, business, or profession. Coaching utilizes personal strategic planning, values clarification, brainstorming, motivational counseling, and other counseling techniques.

The primary foci of psychotherapy are identification, diagnosis, and treatment of mental and nervous disorders. The goals of psychotherapy include alleviating symptoms, understanding the underlying dynamics which create symptoms, changing dysfunctional behaviors which are the result of these disorders, and developing new strategies for successfully coping with the psychological challenges which we all face.

Confidentiality

As a licensed psychologist, I am ethically and legally bound to protect the confidentiality of our communications. I will only release information about our work to others with your written permission or in response to a court order. There are some situations in which I am legally obligated to breach confidentiality in order to protect you or others from harm. If I have information that indicates that a child or elderly or disabled person is being abused, I must report that to the appropriate state agency. If a client is an imminent risk to him/herself or makes threats of imminent

violence against another, I am required to take protective actions. These situations are quite rare in coaching practices. If such a situation occurs in our relationship, I will make every effort to discuss it with you before taking any action.

As you are no doubt aware, it is impossible to protect the confidentiality of information that is transmitted electronically. This is particularly true of e-mail and information stored on computers that are connected to the internet, which do not utilize encryption and other forms of security protection.

Some sessions may be conducted in a group format. By signing this agreement, you commit yourself to maintaining the confidentiality of all information communicated to you by other coaching clients and by your coach. We both understand that progress is often enhanced when clients are allowed to discuss their coaching relationship with trusted colleagues and friends. You can have these discussions, but you must in no way share information that leads to the identification of others in the group. If you are ever in doubt regarding what to reveal and what not to reveal, err on the side of protecting the privacy others, a vital and nonnegotiable element of such group interaction.

By your signature below you indicate your understanding that the services that will be provided are coaching services, not psychotherapy and therefore are not covered by insurance.

Client/Guardian Signature

Date