

## Coaching Agreement



This document establishes participation in the askSlim Coaching Program, and is an agreement between Trading Coach, Steven L. Miller and

Client, \_\_\_\_\_,

beginning on \_\_\_\_\_ (mm/dd/yy)

and will continue for a minimum of 2 months. The fee for this program is \$9800.00, payable prior to the first session. Upon completion of this initial program, optional coaching, upon agreement by Coach and Client, is available on a monthly basis. Subsequent monthly fees are \$1500 for scheduled coaching. An average of 4 weeks per month is used in calculating the monthly fee. Specially scheduled sessions, beyond scheduled weekly sessions, will be at a rate of \$475/hr. Checks are to be payable to Steven L. Miller.

### **Services**

This coaching program is designed to be delivered over a 2-month initial period. The first month will consist of two 2-hour sessions and six 1-hour sessions, delivered by the Coach to the Client by phone and may include email coaching. The second month includes two weeks of bi-weekly one-hour sessions, after the market closes and two weeks of bi-weekly thiry-minute sessions, beofre the market opens.

Coaching, which is not advice, therapy or counseling, may address specific personal projects, business issues, or general conditions in the Client's life or profession. Other coaching services may include value clarification, brainstorming, identifying plans of action, examining modes of operation in life, asking clarifying questions, and making empowering requests. This program includes consulting relative to stock, futures and options markets, goal setting, trading methodology, risk management, technical analysis techniques, systems and trading environments.

Long-term trading success is dependent on many variables. An assessment will be made by the Coach and Client of the progress made during the 2-month program to determine the benefit and design of additional coaching on a monthly basis.

### **Policies and Commitments**

The Coach commits to:

- Be honest and straightforward
- Hold to the intention for growth of the Client's knowledge, skills and intuition as a trader
- Hold the Client accountable to defined methodology and risk management
- Vigilantly support the Client
- Email contact between sessions as needed
- Notify the Client in advance of unavoidable scheduling conflicts

The Client commits to:

- Attend meetings and calling the Coach on a timely basis
- Be responsible for telephone, travel and related expenses
- Notify the Coach in advance of unavoidable scheduling conflicts
- Ensure payments are received on or prior to the first coaching session of that period
- To give permission to the Coach to be bold and forthright in our interactions
- To try on a new way of being, do homework, take actions on new discoveries
- Take full responsibility for all choices, decisions and changes in your life

The Client accepts full responsibility for participation in coaching and agrees to release, indemnify and further hold the Coach harmless from any and all actions taken by the Client after coaching session(s). The Client acknowledges that this coaching program offers no guarantee that the Client will achieve an improvement in trading or investment results and does not offer any guarantee of success whatsoever.

### **Termination**

The Client and Coach agree to provide one another with a fourteen-day (14) notice to cancel further services. Notification of termination must be made in writing and delivered by fax or email. If the client terminates prior to the end of the 2-month program there will be no refund.

### **Confidentiality/Mutual Non-Disclosure**

As a matter of ethics, the Coach has the responsibility to maintain strict confidentiality about all personal information shared by the client. The Coach will not voluntarily divulge that he is in a coaching relationship with the Client without written permission, unless required to do so by a court order. The only exception is when the Client shares information that gives the Coach reasonable cause to believe there are threats of serious harm to the client or others. Every effort will be made to discuss this with the Client before the Coach exercises his obligation to report the situation to the proper agent.

The Coach and Client mutually recognize that they may discuss the future plans, business affairs, customer names, financial information, job information, goals, personal information, and other private information. The Coach will not voluntarily communicate the Client's information to a third party. In order to honor and protect the Coach's intellectual property, the Client likewise agrees not to disclose or communicate information about the Coach's personal information, practice, materials, or methods to any third parties.

### **Agreement**

The signatures on this agreement demonstrate the intent to fulfill the intentions and requests above and reflect a complete understanding of services to be provided. As Client, I understand and agree that I am fully responsible for my well being, choices, decisions, and actions taken during and after my coaching sessions.

Signature of Client \_\_\_\_\_ Date \_\_\_\_\_

Name of Client (please print) \_\_\_\_\_

Steven L. Miller \_\_\_\_\_ Date \_\_\_\_\_  
Coach