

Thank you for making Fetterman Financial Solutions, LLC a part of your financial planning! I look forward to serving you. To help guide our coaching relationship, I ask that you review and sign below to accept the following:

SCHEDULING APPOINTMENTS

To schedule your next appointment, you can email me at: mike@fettermanfinancialsolutions.com or call 571-293-1076, or find an open spot on my online calendar at: www.fettermanfinancialsolutions.com and I'll confirm your coaching session with me. Coaching sessions can be conducted over the phone, a mutually agreed upon location that provides privacy or via video conference. If you are married, both spouses must participate to provide the best possible outcome. If you need to reschedule your coaching session for any reason, please let me know with at least a 24-hour advanced notice to avoid being charged for the session. Follow-on plans and sessions will be confirmed as needed.

COACHING SERVICES AND FEES

As your financial coach, I assume the responsibility of understanding and evaluating your current needs, goals, and resources in order to develop a strategy to meet your objectives. In order to make your plan work, you will need to come prepared to take the steps necessary to succeed. You'll take full responsibility for your plan and its implementation, and will contact me when you need additional advice and direction. The fee for each one-hour coaching session is \$75 and is payable in advance when the appointment is confirmed. It can be paid via debit card or credit card by scanning either the PayPal or Venmo QR code below:



PayPal



Venmo

CONFIDENTIALITY POLICY

I will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to me or we generate. I will only reveal anything with verifiable verbal and written instructions from you telling me exactly what I may reveal.

PAPERWORK

You are asked to complete preliminary paperwork so that I can better serve your needs. I ask that these forms be completed to the best of your knowledge prior to your scheduled appointment. You assume all responsibility for providing accurate and complete information. I don't need specific account numbers or access to any of your accounts.

DISCLAIMER

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. I am not authorized to render legal, accounting, or other professional advice. Since your situation is fact-dependent, you may also need to seek the services of an appropriate licensed legal, accounting, or investment professional. You agree not to sue Fetterman Financial Services, LLC or any of its members either personally or in the name of their company. Any damages that would ever result from any lawsuit, should one be instituted against this agreement, are limited to the fees you have paid to Fetterman Financial Solutions, LLC in the last six months.

I _____
acknowledge, understand and agree to the above coaching agreement, disclaimer, and agreement not to sue.

Name/s: _____

Signature/s: _____ Date: _____