

Trusted Advisor Agreement:
Client Name (Client Company)
and Your company, LLC

The following agreement is entered into on _____, 20__ between CLIENT/ NAME of CLIENT COMPANY (“You/Your” or the “Client”) located at _____ and NAME OF COMPANY, a STATE AND TYPE OF ENTITY, (“Company”) located at ADDRESS OF COMPANY.

Hereinafter this agreement shall be known as the “Agreement” and it is entered into for the purpose of creating and experiencing more of what is good, true and beautiful in the world.

1. Company’s Pleasure. For the consideration set forth in this Agreement and in exchange for your agreement to the promises contained in this Agreement, it shall be the Company’s pleasure to serve You in working with _____ as your Trusted Advisor (the “Consulting”).

2. For How Long. The Term of this Agreement will be from DATE through DATE (the “Term”) beginning as soon as the first call is scheduled between CLIENT NAME and NAME OF CONSULTANT, renewable, as desired and discussed under new terms, subject to any agreed-upon changes, which must be documented in writing and agreed to by both You and Company.

3. Your Pleasure. You will enjoy the following benefits of our work together:

Scope of Trusted Advisor Work:

30-90 minute strategy calls with __, as needed (up to 6 hours of call time to be allocated as you need/desire + email/text access for emergency situations, especially during launch periods where fast action is required. Must be used by end of 2015, with the understanding that beginning late November through the end of the year, time will be hard to schedule.)
ESTABLISH BOUNDARIES CLEARLY, SO THAT YOUR CLIENT KNOWS EXACTLY WHAT YOU WILL PROVIDE, WHEN AND HOW

- **Add More Specifics**
- It will be your responsibility to take action on the tasks created as a result of the strategic decisions made on these calls.
- **[EDIT]** Emergency email/text support is to be used when fast action is required, such as during a launch or in the midst of a conflict.

Outcome:

Page PAGE 5 of 5

This sample client agreement is just one of the resources available to support you in building your life and business awake, aware and on your terms via Eyes Wide Open, LLC and the LIFT Foundation System.

Please be sure to replace my name, company name, city, state and any other specific information with information specific to you and your business, even where not explicitly marked. This template agreement should be reviewed by a lawyer before use by you. We recommend you find a [Family Business Lawyer here](#).

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SPECIFY DETAILS AS CLEARLY AS POSSIBLE SO THAT EXPECTATIONS ARE CLEARLY SET FOR THE OUTCOME THAT IS BEING PROMISED. REMEMBER TO PROPERLY MANAGE EXPECTATIONS OF WHAT'S POSSIBLE.

4. The Financial Investment.

SPECIFY DETAILS RE HOW PAYMENT IS MADE, HOW OFTEN, AND PAYABLE IN WHAT FORM

You understand that by claiming your spot in Trusted Advisor work with _____, you have made it unavailable for anyone else and that _____ will block time on her schedule and space in her consciousness to hold you during your exploration and transformation. It is your responsibility to show up for all pre-scheduled calls and to follow through on all assignments given by _____.

By signing this Agreement, You agree to be legally obligated to pay the full amount of the Investment and/or all monthly installments, whether you attend these calls or not, so long as COMPANY representative is available for the calls.

5. Confidential Relationship. During the course of the Trusted Advisor relationship, You may receive, or disclose, information of a private or confidential nature, including but not limited to personal stories of growth and recovery ("Private Information"). You agree that neither of us shall share Private Information with any third party in the absence of an agreement signed by both of us. All such information will be kept confidential including the existence, terms, and amount of this Agreement.

You agree not to disparage COMPANY or any team members of COMPANY for any purpose at any time. You agree if you have anything to say about COMPANY or any team member of COMPANY that you will discuss such complaints with COMPANY directly so that attempt to resolve any unhappiness with the services provided can be addressed.

[Consider Adding Work for Hire Provisions/Ownership of IP Provisions Here, Where Appropriate. These provisions are available in the full LIFT Foundation System.]

6. Risks of the Consulting. (a) You understand and agree that Alexis Neely, COMPANY, and the individuals teaching, leading, or otherwise participating in the Consulting are not licensed

Page PAGE 5 of 5

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therapists, or other licensed professionals and are not meant to replace the care and advice of licensed therapists, doctors, or other licensed professionals; (b) You understand and agree that Alexis Neely is not your lawyer, but is acting as a consultant and coach only and that any legal work to be undertaken will be done by legal counsel you hire separately or by yourself on your own behalf; (c) You understand and agree that there is a risk of financial loss involved in Your participation in the Consulting (“Risks”); (d) You are responsible for Your own results. You take full responsibility for Your participation in the Consulting, and all of the decisions You make during and following enrollment in the Consulting.

7. You Release Us From All Liability. You acknowledge and agree that any and all Risks, including but not limited to personal injury, death, property damage or other loss suffered by You is solely your responsibility. You accept and expressly assume all risk of such injury, death, damage, or loss and release and discharge Alexis Neely, COMPANY, and its officers, owners, employees, and servants from all claims, demands, losses, causes of action, suits, or judgments of any and every kind that You or Your heirs, executors, administrators or assignees may have arising out of, or in connection with Your participation in the Consulting.

8. Disagreements Will Be Handled By Mediation and Binding Arbitration. In the event a dispute arises between the parties, either arising from this Agreement or otherwise pertaining to the relationship between the parties, the parties will attempt to resolve the dispute through community mediation, in which a member of the community is selected by each of the parties to support the co-creation of a collaborative resolution. In the event that collaborative resolution is not available, the parties agree to submit to binding arbitration before the American Arbitration Association. Any arbitration commenced between the parties will be filed in Boulder, CO. **REPLACE WITH YOUR OWN CITY AND STATE.**

9. Notices. Any and all notices to be served hereunder, including the commencement of an arbitration shall be by regular and certified mail (return receipt requested) to the addresses set forth at the top of this Agreement.

10. Company May Discontinue Working With You. No provision of this Agreement shall prevent Company from discontinuing its work with You in the Consulting, in its sole and exclusive discretion. Company will only make a decision to not continue your membership in the Consulting if Company determines you are not taking 100% responsibility for your results, blaming, creating a victim/persecutor pattern or otherwise deflecting responsibility for Your experience. The decision by Company to discontinue work with You shall be final, not subject to any appeal and, to the extent permissible by law, non-reviewable. You will receive pro rata return of any

Page PAGE 5 of 5

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unexhausted portion of Your Investment.

11. All Agreements Need Some Legal Details. This Agreement shall be construed in accordance with the laws of the State of Colorado, without regard to the conflicts of law rules thereof. No adverse inference shall be drawn against the party whose attorneys physically prepared this Agreement. This Agreement is intended to be as broad and inclusive as Colorado law permits. In the event that any term, provision, covenant or condition of this Agreement is found to be invalid, illegal or otherwise unenforceable, the remainder of the Agreement shall continue in full force and effect as if this Agreement had been executed with the invalid portion eliminated. This Agreement sets forth the entire understanding of the parties on the specific matters addressed herein, and supersedes any and all prior agreements, understandings and negotiations, both written and oral, between the parties (except to the extent that the terms herein incorporate by reference additional agreements). The parties acknowledge that no statements, whether oral or written, not expressly set forth in this Agreement have been relied upon or are intended to be made part of this Agreement. This Agreement may not be amended or modified except by a subsequent written agreement executed by all of the parties hereto. The waiver of any party to a breach of this Agreement shall not operate or be construed as a waiver of any subsequent breach by any party hereto, unless such waiver is expressed in a subsequent written agreement executed by all of the parties. The headings for this Agreement are for organizational and drafting purposes only and shall not affect the substantive rights and obligations herein. Facsimile and pdf copies of this agreement and signatures by facsimile and pdf or other technologies, including electronic signatures, shall be valid and binding as if originals

12. Severability. If any provision, clause, terms, or words of this Agreement are declared void or unenforceable, such provision, clause, terms, or words shall be deemed severed from this Agreement, and all remaining provisions, clause, terms, or words shall otherwise remain in full force and effect.

13. Attorney's Fees. In the event of any breach of this Agreement and action for enforcement hereof, the prevailing party shall be entitled to have and recover from the other party all costs, expenses and attorney's fees reasonably incurred thereby, together with interest at the highest rate permitted by law on any and all amounts deemed to be due and owing (including costs, expenses, and attorney's fees), which interest shall accrue from the date of any such claim or amount which has arisen until fully paid.

Page PAGE 5 of 5

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14. Assignability. Neither party shall assign this Agreement without the written consent of the other.

If the foregoing accurately reflects Your agreement with COMPANY's Consulting, please sign below.

AGREED AND ACCEPTED:

Client Name + Title:

Client Signature:

Date:

On Behalf of Company: NAME, TITLE acting on behalf of NAME OF COMPANY, LLC

Company Signature:

Date: _____