

C3 HEALTHY LEADERSHIP CLIENT SERVICES AGREEMENT

Healthy Leaders. Healthy Cultures. Lasting Impact.

This Client Services Agreement ("Agreement") is entered into between **C3 Healthy Leadership / Matthew Friese** ("C3") and **[Client/Organization Name]** ("Client"), effective **[Date]**.

1. ENGAGEMENT

Service: ☐ Keynote Speaking ☐ Leadership Coaching ☐ Leadership Training/Workshop
☐ Maxwell Leadership DISC Assessment ☐ Other: _____

Program/Engagement Title: _____

Date(s): _____

Location/Delivery Method: _____

Audience/Participants: _____

Primary Client Contact: _____

C3 will provide the services described above and in any attached proposal, scope of work, or engagement summary incorporated into this Agreement.

2. PROFESSIONAL FEES

Professional Fee: \$ _____

Deposit/Retainer: \$ _____

Balance Due: \$ _____

Payment Schedule: _____

Unless otherwise stated in writing, the deposit/retainer is due upon execution of this Agreement and reserves the engagement date. Remaining fees are due [14/30] days before the engagement. Additional services outside the agreed scope require Client approval and may result in additional fees.

3. TRAVEL AND ENGAGEMENT EXPENSES

When applicable, Client will reimburse or directly provide agreed reasonable travel expenses, including airfare, mileage, lodging, ground transportation, parking, and other approved travel costs. Travel arrangements and reimbursement requirements will be agreed upon in writing before expenses are incurred.

4. CANCELLATION AND RESCHEDULING

If Client cancels or requests rescheduling, C3 will make reasonable efforts to accommodate an alternate date. Unless otherwise agreed in writing: cancellation more than 30 days before the engagement - Client is responsible for the deposit and nonrefundable expenses already incurred; cancellation 15-30 days before the engagement - 50% of the contracted professional fee is due; cancellation fewer than 15 days before the engagement - 100% of the contracted professional fee is due.

If C3 must cancel because of illness, emergency, travel disruption, or circumstances beyond reasonable control, C3 will make reasonable efforts to reschedule. If rescheduling is not possible, fees paid for services not delivered will be refunded. Neither party will be responsible for failure to perform caused by circumstances reasonably beyond its control.

5. SPEAKING AND TRAINING SERVICES

For speaking, workshops, and training engagements, Client agrees to provide reasonable facilities, audiovisual equipment, access, and logistical support necessary for the agreed program. C3 may customize the presentation to address Client objectives, audience, culture, and leadership challenges. Unless specifically agreed otherwise, C3 does not guarantee particular organizational, financial, personnel, or performance outcomes.

6. COACHING SERVICES

Coaching is a professional development relationship designed to promote leadership growth, self-awareness, alignment, and intentional action. Coaching is **not psychotherapy, medical care, legal advice, financial advice, or mental-health treatment**. Client remains responsible for personal and professional decisions and actions resulting from the coaching process.

Information shared during individual coaching will be treated as confidential except where disclosure is required by law, necessary to address an imminent safety concern, or specifically authorized by Client. For employer-sponsored coaching, C3 and Client will establish in advance what information, if any, may be reported to the sponsoring organization.

7. MAXWELL LEADERSHIP DISC ASSESSMENTS

When DISC assessments are included, C3 will administer and/or facilitate authorized Maxwell Leadership DISC assessment services as agreed with Client. DISC is intended as a **leadership, communication, behavioral-awareness, and development tool**. It is not a psychological or medical diagnosis and should not be represented as such. Assessment materials, reports, trademarks, methodologies, and related intellectual property belonging to Maxwell Leadership or other third-party licensors remain the property of their respective owners and are subject to applicable licensing and usage requirements.

8. CONFIDENTIALITY

C3 recognizes that engagements may involve confidential information concerning individuals, teams, ministries, businesses, or organizations. C3 will exercise reasonable care to protect confidential information disclosed during the engagement and will not intentionally disclose such information except with authorization, as necessary to perform the agreed services, or as required by law. Client likewise agrees to respect C3's confidential business information, proprietary materials, curriculum, and intellectual property.

9. INTELLECTUAL PROPERTY

Unless otherwise agreed in writing, C3 retains ownership of its original presentations, frameworks, curriculum, exercises, handouts, workbooks, coaching materials, graphics, recordings, and other intellectual property. Client may use materials provided by C3 internally for the purposes of the contracted engagement but may not reproduce, publish, sell, distribute, modify, record, teach, license, or commercially use those materials without prior written permission. Third-party materials remain subject to the rights and restrictions of their respective owners.

10. RECORDING, PHOTOGRAPHY AND MEDIA

Client may not record, livestream, reproduce, or distribute a C3 presentation, workshop, training session, or coaching session without prior written authorization. Unless otherwise agreed, C3 may request permission to use approved photographs, video excerpts, testimonials, or general descriptions of an engagement for professional marketing purposes. No identifiable Client material will be used for marketing without appropriate authorization.

11. RELIGIOUS AND FAITH-BASED CONTENT

C3 Healthy Leadership is founded on the principles of **Connect with God. Connect with Self. Connect with Others**. For faith-based engagements, biblical principles and Christian faith integration may be incorporated into the program. For corporate, governmental, military, nonprofit, or other settings where different requirements apply, the nature and level of faith integration will be established with Client before the engagement and delivered consistent with the agreed scope and applicable organizational requirements.

12. INDEPENDENT CONTRACTOR

C3 is providing services as an independent contractor. Nothing in this Agreement creates an employer-employee relationship, partnership, joint venture, or agency relationship between C3 and Client.

13. LIMITATION OF SERVICES

C3 will provide services professionally and in good faith. Leadership development, coaching, training, and behavioral assessments depend substantially upon participant engagement and circumstances beyond C3's control; therefore, specific outcomes cannot be guaranteed.

14. GOVERNING LAW AND DISPUTE RESOLUTION

This Agreement will be governed by the laws of the State of [STATE], without regard to conflict-of-law principles. The parties agree to first make a good-faith effort to resolve any disagreement through direct discussion. Any additional mediation, arbitration, venue, or litigation provisions desired by C3 should be specified here after legal review.

15. ENTIRE AGREEMENT

This Agreement, together with any attached proposal, Statement of Work, or Engagement Summary, constitutes the entire agreement between C3 and Client concerning the services described herein. Any modification must be made in writing and agreed to by both parties. Electronic signatures and counterparts may be accepted to the extent permitted by applicable law.

ACCEPTANCE

C3 HEALTHY LEADERSHIP

Matthew Frieze
Speaker • Coach • Trainer

Signature: _____
Date: _____

CLIENT

Organization: _____
Authorized Representative: _____
Title: _____
Signature: _____
Date: _____