



Balance & Align

DISCLAIMER & RELEASE FORM CONFIDENTIAL

Dear Wonderful Human,

Thank you for choosing to spend your time with Balance & Align.

This **disclaimer and consent form** is required for booking and attending any **session, workshop, clinic, or camp** with Cat at Balance & Align. It is intended to ensure **your wellbeing and that of your horse, other participants (if applicable)**

This consent form is **confidential**, and will be stored in a locked online folder. The only time we may share this information with others is in case of an emergency or in requirement of a legal procedure.

Key information for on site:

Full Name:

Date:

Email:

Contact Number:

Emergency Contact Name & Number:

Dietary Requirements / Allergies / Medication (if applicable):



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Photos and Videos

You consent to Cat & supporters of the event to taking, storing and sharing photos or videos for the following purposes:

1. To capture meaningful moments from your session that will be sent privately via Whatsapp or social media.

YES / NO

2. For promotional/training/publicity purposes.

After giving your consent, your chosen Photos/videos can be used by the facilitators in print or digital form, including on social media in compliance with their media policy.

YES / NO

The signature below indicates I have read, understood and agree to the contents of this release form.

Use of data

You consent to Balance & Align collecting, processing, storing and sharing personal data (including health info) for the following purposes:

To share with health professionals in case of an emergency

YES/NO

To be used within the team to ensure the smooth running of a session, event or workshop.

Name:

Signed:

Date:

Thank you, your time and attention is so appreciated.



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Description of Coaching

Coaching is a collaborative partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client.

In this context, coaching is a thought-provoking and creative process designed to inspire the Client and facilitate the development of their personal and relationship goals.

Equestrian Relationships Coaching

Equestrian Relationship Coaching (ERC) is a holistic and integrative approach that weaves together a variety of approaches and modalities to help you cultivate a deeper, more connected relationship with your horse and yourself. These modalities include:

- Personal Coaching
- Relationship building
- Attunement & Co regulation
- Nervous system regulation
- Gentle & emotional based horsemanship
- Equine trauma release
- Gentle bodywork
- Psychology & behaviour
- EFT (Emotional Freedom Technique)

Together, we will explore strategies tailored to support both you and your horse in understanding and connecting with one another. This is an exploratory process rather than a results based process, and you are responsible for continuing to implement and reflect upon this work between sessions.

My role as a coach

Is to support, facilitate, challenge and empower you to develop meaningful and resourceful solutions that you create & choose for yourself.

I may offer suggestions or highlight opportunities, tools, or perspectives that may be helpful—especially when relevant to my professional experience— however, my input does not constitute direct instruction or legal, clinical, or financial advice. You remain fully responsible for your actions and choices throughout our relationship & sessions together.

Coaching is a collaborative process, not a co-dependent one. You are accountable for integrating what you learn into your daily life and for using our sessions as a springboard for your personal and relational growth.

You may notice changes at a pace unique to you—sometimes rapid, sometimes gradual. Your horse may also experience change in their own way and time. Staying open-minded and trusting the process is helpful, as transformation for both you and your horse may unfold in unexpected and powerful ways.



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Dealing with challenge

At times, the coaching process may feel challenging or uncomfortable. Challenge can signify moving towards the unknown, and this is why it may go hand in hand with growth. Leaning into these moments can be helpful, and communicating openly when you feel challenged to is encouraged. In the coaching space you can share your thoughts, feelings and thresholds and this can be a valuable coaching conversation. Please do seek extra support if needed.

Your horse may also go through periods of discomfort or non-linear progress. These experiences are often part of their development. Each horse will respond and evolve in their own way and time. Staying open to this unfolding process is key, as change is not always predictable but can be deeply transformative.

Coaching & Guidance

1.1 You (the client) understand that the guidance provided is intended to empower you to make my own informed decisions. Cat (The Coach) cannot make decisions on your behalf or guarantee specific outcomes. The Coach is not and shall not be held liable for any actions, inactions, or outcomes related to the coaching services provided.

1.2 You agree that Coaching is not a substitute for therapy, counselling, or medical treatment, nor is it intended to diagnose, treat, or prevent any mental or physical health conditions. The Coach does not provide counselling, therapy, veterinary advice, or riding instruction. Their role is to offer coaching and mentoring to support the development of my relationship with my horse.

1.3 You agree to follow all safety instructions provided by The Coach, particularly when working with horses, to ensure the safety of yourself and others.

1.4 You understand that as the Client, you are solely responsible for your own physical, mental, and emotional well-being, decisions, actions, and results arising from the coaching relationship and interactions with the Coach and coaching process.

Coach-client relationship

1.5 You will inform The Coach promptly if, at any point, I feel that coaching is no longer appropriate for you or your horse.

1.6 You can contact Cat anytime at catherine@balanceandalign.com.

1.7 As the Coach, Cat agrees to uphold the ethics and standards of behaviour set out by the International Coaching Federation (ICF). You can review the ICF Code of Ethics here: www.coachingfederation.org/ethics.



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Confidentiality

This coaching relationship, along with all verbal and written information shared by the Client as part of this engagement, is governed by the principles of confidentiality outlined in the **ICF Code of Ethics**.

However, the **Coach-Client relationship** is not a legally protected relationship (such as that of doctor-patient or attorney-client), and therefore communications are not protected by legal privilege.

The Coach agrees **not to disclose any Client information without written consent**. The Coach also agrees not to use the **Client's name as a reference without their express permission**.

Confidential Information does not include information that:

- (a) was already in the Coach's possession prior to being provided by the Client;
- (b) is publicly available or generally known within the Client's industry;
- (c) is received from a third party without breaching any confidentiality obligations;
- (d) is independently developed by the Coach without reference to the Client's confidential information;
- (e) must be disclosed by law, court order, or legal process;
- (f) is disclosed in the event the Coach believes there is an imminent risk of harm to the Client or others;
- or
- (g) involves illegal activity.

1.8 The Client acknowledges their **ongoing responsibility** to raise any concerns regarding confidentiality with the Coach in a timely manner.

Confidentiality Ongoing education:

The Coach participates in ongoing training and continuing education as part of maintaining their ICF (International Coach Federation) credentials. This may require the submission of Client names and contact details for verification purposes by the ICF.

By signing this agreement, the Client consents to the sharing of their name, contact information, and coaching start and end dates with ICF staff and relevant parties solely for the purpose of verifying the coaching relationship. No personal coaching notes or session content will be disclosed.

Confidentiality: working with a group (for workshops, camps, clinics etc.)

2:1 Since information may be disclosed to you or by you over the course of a workshop/group session, it is important that you help us maintain privacy & confidentiality and that of other participants by acknowledging and agreeing:

- 1) You shall treat the information disclosed by others as private or confidential; and
- 2) not to directly, indirectly communicate or disclose (whether electronically, in writing, orally, or in any other manner) and information that is disclosed by another group member



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Data handling

2:2 As a client The Coach may hold and store your personal data including your name, email address, postal address, telephone number and photograph. To provide detail of other services to you and for our internal administration related to you.

2:3 The Coach may contact you (by mail, email, telephone, SMS, via the Internet, WhatsApp or other messaging services) in relation to sessions and services.

Liability

2.4 In no event shall The Coach be be liable to the Client for any indirect, consequential or special damages. Notwithstanding any damages that the Client or horse may incur, our entire liability under this Agreement, and the Client's exclusive remedy, shall be limited to the amount actually paid by the Client under this Agreement for all coaching services rendered through the term as far as permitted by law.

2.5 Nothing in this Agreement shall be taken to exclude any liability of either party for death or personal injury caused by its negligence or any fraudulent misrepresentation.

Medical and Other Referrals

The Coach is not a clinical psychologist, therapist or counsellor, and if there are issues that Coach & Client agree are best suited to one of these mediums, The Coach will advise you to seek that support from a qualified practitioner of that nature. The Coach may from time-to-time suggest where other courses may be beneficial to you.

The Coach is not a vet, and therefore unable to diagnose conditions, issues or illnesses, or recommend treatment for such problems. If there are any issues that we agree are best suited to one of these mediums, The Coach will advise you to seek that support from a qualified practitioner of that nature via your horse's registered vet.

The Coach is not a riding instructor and am unable to provide such instruction. The sessions will take place primarily on the ground.



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Payment & Cancellation Policy

(3.1) The Client agrees to provide at least 48 hours' notice to reschedule a session. In the case of genuine emergencies—such as medical, veterinary, or family emergencies—exceptions may be made. If less than 48 hours' notice is given without a valid reason or prior communication, the full session fee will apply.

(3.2) Session payments are non-refundable, except where cancellation is initiated by Balance & Align. This policy covers time spent on booking, preparation, and administration.

(3.3) If the Client is unable to attend a booked session, all reasonable efforts will be made to fill the space. A discretionary refund may be issued if the place is successfully filled.

(3.4) In the unlikely event that a session is cancelled by The Coach, no responsibility can be accepted for any external bookings or expenses incurred by the Client.

(3.5) If a session or event is postponed, all monies paid may be transferred to the rescheduled date. The fee applicable at the time of the new date will apply.

Logistics

(4.1) You (The Client) accepts that you are responsible for your own safety throughout each session. I understand that participation is at my own risk, and I release Balance & Align from any liability.

(4.2) You acknowledge that all guidance and exercises are offered on an invitational basis. There is no obligation to participate, and you retain the right to make decisions that prioritise the safety and well-being of yourself and your horse.

(4.3) You accept responsibility for communicating with The Coach if any issues, concerns, or questions arise.

(4.4) You agree to treat the venue, facilities, and shared spaces with respect, and to leave them in the same clean and orderly condition in which they were found **(when applicable)**.



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(This stuff sounds serious, don't worry - it is for those 'just in case' moments!)

Termination:

- Either the Client or the Coach may terminate this Agreement at any time with 4 weeks written notice. Client agrees to compensate the Coach for all coaching services rendered through and including the effective date of termination of the coaching relationship.

Entire Agreement:

- This document reflects the entire agreement between the Coach and the Client, and reflects a complete understanding of the parties with respect to the subject matter. This Agreement supersedes all prior written and oral representations. The Agreement may not be amended, altered or supplemented except in writing signed by both the Coach and the Client.

Dispute Resolution:

- If a dispute arises out of this Agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to (certain amount of time such as 30 days) after notice given. If the dispute is not so resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.



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Participant Declarations

By signing this form, I confirm the following:

- I am over 18 years old.
- I am legally capable of entering into binding agreements.
- I am participating voluntarily and accept full responsibility for my wellbeing.
- I am in good emotional, mental, and physical health.
- I am not under the influence of alcohol or illegal substances.
- I am not undergoing treatment for any psychiatric illness.
- If taking medication, a medical professional has confirmed I can safely participate.
- I understand that if I am asked to leave, I will do so immediately and without dispute.
- I have provided complete and accurate information for participation.

Coachee

Signature _____

Date _____

Coach

Signature _____

Balance & Align **Equestrian Relationships Coaching**

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