



# HOLISTIC COACH TRAINING INSTITUTE

**Holistic Coach Legacy Program  
Outline & Agreement**

*(Please read this document in its entirety and let me know if you have any questions)*

**Welcome to this incredible experience** where you will be learning and becoming your best coaching Self over the course of the next few years. You have taken a massive step forward in joining a process that will be addressing your inner and outer experience. Together we will work on inner healing, skill development and actualizing your soul's mission through coaching. Your development requires tremendous intention, accountability and determination. And **I am here to partner up with you**, and make it happen.

We are in this together! You are an important part of the group. Always remember that you are adding your essence, whether you are showing up or not. This truly is a collective energy of people who intend to make a meaningful impact in the world. As your Coach, I'm here to support the highest good for all! All I ask is that you show up as powerfully as you can, try on the new info you are receiving and share your learnings with us. I don't know what you don't communicate so be as honest and real with yourself so that you can be as honest and real with me and the group. **This program is focused on personal healing, professional coach development, and business start-up.**

In order to create safety for yourself and others, [check out the Spiritual Psychology Coaching Method Intentions here.](#)

This goes without saying, but the people who show up consistently, implement what they are learning and share their experience are the people that do the best and receive the most value. Remember that you create value for yourself. Take ownership of creating a schedule that supports your highest learning and action.

I can't wait to see what we create together.

Bev 🙏💜

**Program Contact Info:**

Email - [info@holisticcoachtraininginstitute.com](mailto:info@holisticcoachtraininginstitute.com)

Website - [www.holisticcoachtraininginstitute.com](http://www.holisticcoachtraininginstitute.com)

Phone - (904) 469-6009

**Title of the program:**

Holistic Coach Legacy Program

**General program vision and goals:**

Comprehensive 2-year journey that guides you through personal healing, professional coach development, and business start-up.

**The Holistic Coach Legacy Program includes:**

Spiritual Psychology Healing Course, Holistic Coach Certification Program, Holistic Coach Certification Program Advanced, Holistic Coach Business Start-Up Course, Spiritual Psychology Coaching Method, Continuing Coach Education Program, Coach Supervision Program, done for you programs, and live group coaching support. Plus any additional offerings we may add.

**Learning Goals:** Personal healing to thriving, professional coach development, and business start-up

- Resolve unresolved issues so you can be your best Coaching Self for you and others
- Increase your confidence in your coaching skill set so you can become an effective Coach
- Implement foundations to a coaching business so that you are creating consistent Clients

## **The Legacy Philosophy:**

We are Coaches committed to the journey of personal healing to thriving, professional coaching development, and creating a purposeful and prosperous legacy into the world. We do this by completing our inner work, continuing to advance our coaching skills and integrating our coaching.

## **List of Instructors:**

Lead Instructor: Beverly Sartain, PCC

Instructor: Richard Sartain, ACC

## **Dates, location, and delivery of the program:**

Holistic Coach Legacy Program is an evergreen program which means that you can hop into the program at any time.

This program is set-up as a choose your own adventure type of program which means that you get to decide how you use your access to all the programs included in your Legacy offering. Structure the program, set up your calendar of sessions and set-up an accountability partner, if you like. Remember that the materials are here to support your vision versus feeling like you have to get through all the materials.

- Step 1: Set-up a Planning Session so that you can get support in mapping out your next steps and schedule so that you can get value out of the different programs at a pace that makes sense for you. [Schedule your 1.5 hour call here](#). Come prepared to discuss the concept of legacy and with a rough plan of how you want to use the next few years towards it. Each year, you will get 3 Planning Sessions. Those sessions need to be used each year and are not transferable to the next year. The Planning Sessions are done with Beverly but you can request to do a session with Richard, should you like.
- Step 2: Each week we meet via ZOOM for live 1.5 hour group coaching sessions that provide support around personal healing to thriving, coaching skills and business set-up. Come to these sessions with a specific intention of what you want to get from them. These sessions are accountability sessions that will help you move the needle forward in yourself and outside of yourself. We will use the same Zoom Link every week so please make note of the link so you have it for easy access. Zoom Link is: <https://us02web.zoom.us/j/9222827711>.

Structure is as follows:

- ★ 1st Thursday of each month 11am EST - Business Session - Replay provided in Legacy Program FB Group
  - ★ 2nd Thursday of each month 11am EST - Spiritual Psychology Healing Course - Replay provided in Healing Circle FB Group
  - ★ 3rd Thursday of each month 11am EST - Coach Supervision Program - Replay provided in the Legacy Group FB Group
  - ★ 4th Thursday of each month - Accountability update in the group - Hop on a FB live or share a post in service to holding yourself accountable
- Step 3: Work through the Holistic Coach Legacy Checklist to make sure you are working your way through the curriculum. Work through this at your own pace.

### **Languages that the program is delivered in:**

English

### **Commitments for the program:**

- Dedicate time to your inner and outer work
- Attend at least 2 live sessions or watch replays and provide feedback each month
- Complete the Holistic Coach Legacy Checklist over the 2 years according to your personalized plan
- Be open to receiving feedback on your coaching and business
- Show up powerfully for our sessions and take action
- Be communicative if you need extra support

### **Completion:**

Once the Holistic Coach Legacy Checklist is complete, students are provided a certificate of completion at the end of the 2 year program. Once the 2 year program is

over, there will be an opportunity to continue participation. Renewals will be done on a 2 year basis for \$1,000.

### **Policies on payment of tuition:**

There is a pay in full option that provides a discount to students. And there are payment plan options for those who want to pay monthly. The standard cost of the Holistic Coach Legacy Program is \$8,000 pay in full or available with a 24 month payment plan of \$400 per month for a total of \$9,600. There are no additional fees or interest added to the payment plans. We use Square or Stripe as our invoicing system. Invoices need to be paid within 24 hours of receiving them. If you do not pay within 21 days and have not made arrangements with us around how payment will be made, your access to materials will be discontinued and you will be taken out of the group. If you decide to leave the program, you may be asked to pay for services rendered. Please know you can discuss your needs with us.

### **Refund Policy:**

Full refunds are issued if a notice to cancel is received within 3 days after initial payment is made. There are no refunds after 3 days from the time of initial payment. In order to qualify for a refund within the 3 day period, an email must be sent to [info@holisticcoachtraininginstitute.com](mailto:info@holisticcoachtraininginstitute.com) requesting cancellation. After the 3 day period, cancellations and withdrawals qualify for an "in house credit" that can be applied to future programs or coaching. We are happy to work with you on ensuring you receive the value of your investment. And if you are not getting what you need from the program (for any reason), give us the courtesy of a conversation so we can work through it together. If you are needing different support, let's discuss your needs and course-correct, if needed. A student can leave the program at any time.

### **Confidentiality:**

Recordings will be available for 30 days. No downloads available. Let's work on building trust and safety with each other by keeping things confidential and focusing on the magnificence we see in one another. If you share a recording in class then you need to have permission from the Coachee to share it. Anything shared in the live sessions will be kept confidential unless permission is provided. We may ask if we can use your recording for ICF accreditation purposes. The ICF requires programs to provide student recordings as an example of work being completed in the program. We will ask your permission if we would like to use your recording.

## MONTHLY REQUIREMENTS:

1. **Access module materials** through the learning portal. Look over all materials. Come to our live sessions with questions or comments about each lesson. I love to be interactive with you, and we all learn from one another. Please know your questions and thoughts are welcomed. Learning Portal Login: <https://members.holisticcoachtraininginstitute.com>. Should you have a problem with log-in, contact: [requests@sophistechatedmarketingdev.com](mailto:requests@sophistechatedmarketingdev.com). Login and password are provided to you. Check Spam Folders if you haven't received it before reaching out to the support team.
2. **Practice skills, templates or coaching outline** with a coaching partner, if you like. We do not provide coaching partners in the Legacy Program. Please respect people's time and schedule sessions when convenient to both parties. Best practices are to respect confidentiality, be dependable and be coachable.
3. **Attend live sessions**. When attending live, be sure to be present and available to coach, share and interact. Our preference is that you are on camera for trust and safety. These recordings are confidential and are not meant to be shared with other people not in our class. If you do miss a class, watch the replay and share your learnings in our groups.
4. **Post in the FB Group**. Posting in the online groups is optional, but highly recommended as it gives you another place to be accountable and supported. Best use would be to share your biggest take-aways or learnings from each lesson so that you can ground and deepen your awareness as we move through all the Modules. Post as much as you want, this is your space to connect, to share, to celebrate together! Make sure feedback is positive, supportive and coaching in nature. This is a great place to practice your coaching skills by asking each other powerful questions. Main FB Group is the Holistic Coach Legacy Program and then there is the Spiritual Psychology Healing Circle FB Group. You are not required to join any of the groups, however, you will get the most value out of being there and sharing your experience.

If there is something you are curious about that is not included in this outline and agreement, feel free to ask. Remember that we are in a partnership together. Please communicate with us what's going on for you. We don't know what you don't communicate so make sure to let us know what you need so we can work together to resolve your needs. Communication is key. Here's to an incredible journey!