

**Rev. Dr. Michael R. Bilkis**  
**EFT Coaching and Mentoring**

**Client Agreement for Services**  
**Information about my services, policies, and scope of my EFT Coaching practice**

*Welcome! This document contains important information about my coaching services, business policies, training, and experience. This will provide you with a framework for understanding the scope of our work together and information necessary for you to make a decision about whether to use my services.*

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*Please read the document completely and ask any questions you have before signing. Once you have all of your questions answered, please sign the document and initial where indicated. I am happy to provide you with a copy.*

1. Information about my EFT Coaching services

**Nature of EFT Coaching services:**

I am a board certified Dermatologist and licensed to practice medicine in the state of New Jersey. As an EFT practitioner, I am offering these services as a coach, not a physician. EFT coaching sessions with me are not a medical service and not to be considered any type of psychological therapy. At no time will a diagnosis be provided nor medical advice offered. Coaching services are offered based on my education and experience. Coaching is not a licensed profession. I am offering services as an unlicensed EFT Practitioner/Coach.

My coaching style is to create a supportive, collaborative, heart centered environment where we work together to identify fears, limiting thoughts, and other barriers to achieving your goals. I will teach you certain stress reduction techniques that we will use to address these barriers. These may include, but are not limited to, Emotional Freedom Techniques (“EFT”) (discussed further below), breathing and grounding exercises, affirmations, and gratitude, Past Life Regression, energy healing and mindfulness exercises.

As a coach, I will work to help you optimize your overall vitality and mental well-being, and assist you in developing functional and empowering beliefs. I believe that through Emotional Freedom Technique and other tools, I will help you move forward by releasing the past. In the process of

using EFT to work toward your goals and shift negative thinking, you may experience emotional reactivity. You will find a discussion of possible side effects below.

Coaching assumes the mental health of the client. It is a collaborative process that is present and future oriented. It is also action oriented, with a focus on solutions and change. As the client, you set the agenda for these sessions and your success will largely depend upon your willingness to define goals and try new approaches. You can expect me, as your coach, to be honest and direct, asking straightforward questions and offering techniques to help you keep moving forward

## 2. Information about EFT and what you can expect in our coaching services

EFT, also known as “Tapping,” was created by engineer, Gary Craig, as a simple self-help, stress reduction tool that can be used by everyone. We will use EFT during our sessions and I will also instruct you how to use EFT on your own between sessions.

EFT has a significant body of research supporting its efficacy. References to this research are given below. It involves tapping on acupressure points while thinking of a problem as a way to rapidly reduce the emotional impact of memories and incidents that trigger emotional distress. During our coaching sessions, you will tap on certain acupressure points on your hands, face, head, and torso and the coach will generally tap along on similar points in a supportive and guiding role. Successful EFT can be performed by an individual and does not require a practitioner or coach. You can learn EFT easily on the internet or by reading one of the many books available on the subject.

You can read more about EFT at the following websites: EFTUniverse.com, energypsych.org and the Tappingsolution.com. Several recommended books include: The EFT Manual, Dawson Church; EFT Level 1 Comprehensive Training Resource, Ann Adams, Karin Davidson, The Tapping Solution, Nick Ortner. Research information can be found at EFTUniverse.com/research and energypsych.org.

EFT has been used since at least the mid 1990s. While there is a body of research on the technique and it has been used by millions of people, it is still considered by some as an alternative, and/or experimental, modality. SAMSHA, an agency within the U.S. Department of HHS, maintains a registry of evidence-based practices: National Registry for Evidence Based Programs and Practices (“NREPP”). Thought Field Therapy (“TFT”), on which EFT is based, is now included in this registry as an evidence-based practice, and this designation for EFT is expected to follow shortly.

It is possible that not all of the risks and benefits of using EFT are known. The following are common in Tapping sessions: emotional reactivity may increase and/or decrease; unexpected physical sensations may come and go; previously forgotten memories may surface; memories may become clear. EFT practitioners have generally agreed that the technique is gentle and effective at reducing emotional reactivity quickly. Once emotional reactivity is reduced, there is a corresponding shift in mental perspective.

**This shift in mental perspective, also called a “cognitive shift,” is the reason why EFT is a powerful tool for coaches who seek to support their clients in working toward a goal. With a**

**cognitive shift, clients generally change a limiting belief, such as “I am powerless,” to a more empowered belief, such as, “I am capable and I have options.” These changes help clear the way to attaining goals which is the purpose of our EFT coaching work.**

**My role in our work together will be to facilitate this process of perspective shifts by using stress reduction tools. Once the stress is alleviated around your goals and limiting beliefs, you will have better access to your own strength and wisdom. I will be fully present and provide objective feedback during our sessions. I am not an expert and I will not tell you what to do. You alone are responsible for any success that results from our work together.**

Since coaching is intended for clients in good mental health, brief periods of emotion are generally tolerated easily. Clients often experience quick relief. If the emotions are not tolerated well, we will bring our work to a completion and I will do my best to provide references for mental health professionals. Many people find mental health professionals using the therapy finder at PsychologyToday.com.

### 3. Differences between working with a non-licensed coach and a licensed psychotherapist

Our work together is not intended to replace or interfere with your use of licensed professionals. The differences between EFT coaching and psychotherapy from a licensed professional are explained here.

*Your coaching sessions are not a substitute for counseling, psychotherapy, mental health care, or substance abuse treatment. Psychotherapy is a healthcare service and its primary focus is to identify, diagnose, and treat nervous and mental disorders. Coaching is a relationship that helps people move forward from where they are to where they want to be. Coaching does not address psychological issues. David Feinstein, PhD. identifies the differences between coaching and psychotherapy, which is provided by licensed professionals, as the following:*

1. Psychotherapists can provide a *diagnosis* based on the *DSM* (the American Psychiatric Association’s *Diagnostic and Statistical Manual*). A primary focus of psychotherapy is the identification and diagnosis of mental disorders. Coaching does not diagnose.
2. Psychotherapy can provide diagnosis *independent of* the client's self-assessment. This function is recognized by third parties such as the courts and insurance carriers, which often call up on psychotherapists to make diagnoses independent of the client's self-assessment. Coaching, on the other hand, relies on the client's *self-assessment*.
3. Psychotherapy can use its diagnoses to *treat clinical disorders*. Coaching makes no claims of efficacy in treating clinical disorders.
4. Psychotherapy is often *reimbursable* by health insurance since diagnosis and treatment is recognized as being part of health care. Coaching is not usually reimbursable since it does not involve diagnosis or treatment.

5. Goals in psychotherapy may be *set by the therapist* after diagnosis. Goals in coaching are typically *self-identified by the client*.
6. Psychotherapy goals typically involve *treatment of a mental disorder by the therapist*. Coaching goals typically focus on *quality of life and achieving client set goals*.
7. Psychotherapy typically involves recognized *power differentials* between client and therapist. This vulnerability of clients gives psychotherapists legal and ethical responsibilities. Coaching is in the nature of a *supportive peer-to-peer relationship*, with the results evaluated by the client.
8. Psychotherapy may be provided by *primary caregivers* such as hospitals and may be considered an aspect of primary care. Coaching is not associated with primary care.
9. Coaches will attempt to provide referrals to clients to psychotherapists or psychiatrists if the client's problem is outside their scope of practice.

#### 4. Scope and limitations of our coaching work together

By signing this agreement, you are indicating your understanding of the following:

I understand that my EFT coach is not functioning in the role of a health care provider. He does not diagnose, treat, heal, cure any medical / psychological conditions nor prescribe medications.

I understand that my practitioner does not treat or prescribe medications for any condition. At times, we may use techniques, like Tapping, to address emotional stress around physical conditions. These techniques are not meant to be a substitute for medical consultation and treatment.

I understand that my Practitioner/Coach recommends that I inform my existing professionals that I am receiving coaching in Tapping for stress reduction.

I represent that I will not use coaching services in the place of medical or mental health services by a licensed practitioner and **I understand that my EFT Coach recommends that I inform my licensed professional providers that I am receiving these coaching services, and furthermore that nothing in the coaching services is intended to interfere with professional provider treatment and advice.** I agree that I will not make any changes in treatment I am receiving without first consulting the doctor or other prescribing professional.

I understand the risks described in this form of using EFT for personal growth and change.

#### 5. My background, education and training

##### **EFT Practitioner Education and Training**

EFT Practitioner

I have training and supervision in a technique called Emotional Freedom Technique (EFT), also known as “Tapping” and I have completed the initial training requirements to become certified by EFT Universe. I work with a supervising mentor and review my sessions with her. I also abide by a code of ethics for Tapping practitioners.

**Other Education and Training:**

Board Certified Dermatologist

Interfaith Minister

Reiki Master

Shamanic Healer

Hypnosis and Past Life Regression

Co-Leader Candidate in The ManKind Project

Lead Facilitator of Men's Work Through The ManKind Project

6. Confidentiality

**Disclosure of Personal Information.** Maintaining client confidentiality is extremely important to coaches and organizations. I will take extraordinary care to prevent unnecessary disclosure of your personal information. Information about a client is released only with his or her permission, subject to certain exceptions, listed here:

- 1) If I believe that my client is seriously considering or likely to attempt suicide;
- 2) If I believe that my client intends to assault another person;
- 3) If I believe my client is engaging or intends to engage in behavior that will expose another person to a potentially life-threatening communicable disease;
- 4) If I suspect that my client is abusing, neglecting, or exploiting of a minor or incapacitated adult;
- 5) If I believe that my client’s mental condition leaves him or her gravely disabled.
- 6) If my client is a minor and I believe he or she is in danger.

You do not have any responsibility to maintain confidentiality about what I say or do. You are the person who has the right to decide what you want kept confidential, except for listed exceptions.

7. Technology

**Anonymity, Computers, and the Internet.** Although the internet provides the appearance of anonymity and privacy in coaching, privacy is more of an issue online than in person. You, as a client, are responsible for understanding the potential risks of confidentiality being breached if you use unencrypted email, fail to adequately protect your accounts, or leave information on a public access computer.

Also, please be aware that email is not completely confidential. All emails are retained in the logs of your or my internet service provider. While under normal circumstances no one looks at these logs, they are, in theory, available to be read by the system administrators of the internet service provider. It is best to avoid sharing confidential information by email.

The coach has a right to his or her privacy and may restrict the use of any copies or recordings the client makes of their communications. Clients must seek the permission of the coach before recording any portion of a session and/or posting any portion of a session on internet websites such as Facebook or YouTube.

## 8. Office policies

### **Professional Records**

I keep brief records of each session, primarily noting the date of the session, the topics discussed, and progress or obstacles observed as they relate to your goals in working with me.

### **Minors**

If you are under eighteen years of age, I will need your parent's approval before we begin our work. I will come to an understanding with you and your parents about what will be held confidential. If they agree, I will provide them only with general information about our work together. In any case, confidentiality does not apply if I feel there is a high risk that you will seriously harm yourself or someone else. In this case, I will notify them of my concern. Before giving them any information, I will discuss the matter with you, if possible, and do my best to handle any objections you may have with what I am prepared to discuss.

### **Fees**

My fee for a 75 -minute session is \$281. If we decide to meet for a longer session or a shorter session, I will bill you based on this prorated hourly fee. You will be expected to pay for each session at the time it is held, unless we agree otherwise. Payment schedules for other professional services will be agreed to when they are requested. Fees are subject to change with 30 days prior notice.

Once an appointment is scheduled, you will be expected to pay for it unless you provide 24 hours advance notice of cancellation. If you are late, we will still end on time and not run over into the next person's session. If you miss a session without canceling, or cancel with less than twenty-four hours notice, I ask that you pay for that session by the time of our next meeting unless we both agree otherwise.

**Contacting me**

I am often not immediately available by telephone. I monitor my voicemail box frequently and will make every effort to return your call within 24 hours, with the exception of weekends, vacation time and holidays.

Please note that as an EFT coach, I am not available for 24-hour emergency contact. If you believe that your situation will require a licensed professional with 24-hour emergency support, please discuss this with me as soon as possible because my services may not be appropriate for you.

**Termination and Other**

You are free to terminate our work together at any time.

If I determine that I am unable, for any reason, to provide you with the services you are requesting at a high professional standard, I will inform you of this decision and suggest that you find another professional who may better meet your needs.

If you are involved in legal proceedings based on your having been traumatized, please understand that, through our work together, memories may lose their emotional charge, and this could adversely affect your ability to provide emotionally-charged legal testimony. Please discuss this with your mental health professional and your attorney.

Your signature below indicates that you have read the information in this document, understand it fully, have discussed any questions or concerns with me and/or others, and agree to abide by its terms during our professional relationship.

**Please initial here and sign below to indicate your understanding and agreement:**

\_\_\_\_\_ As explained above, EFT Coaching services are not to be used in the place of appropriate care from a licensed mental health professional. I understand that my practitioner is not a doctor, psychologist, psychiatrist, social worker, counselor, or therapist, and does not practice as a professional in these, or in any other professions, that require a state license. As such, I understand that my practitioner does not diagnose, heal, cure, treat, or prescribe medications. I understand that our work together will not be psychotherapy, nor is it a substitute for the diagnosis and/or treatment of mental or physical health conditions by a psychologist, psychiatrist, or other licensed mental health professional.

\_\_\_\_\_  
Print Name

Date\_\_\_\_\_

\_\_\_\_\_  
Signature