



the ART of the CFO™

CONSULTING

RETAINED SEARCH

COACHING

Coaching Program Confidential Application Form

Name (First and Last)

Company Name

Company/Mailing Address

City

State

Zip Code

Business Phone

Fax

Home Phone (for emergency use only)

Email Address

Birthdate (MM/DD/YY)

Type of Business

Title/Position

Years of Experience

Company's Sales Revenue: < \$ 5 million \$5-20 million \$20-50 million > \$50 million

Is there someone who was influential in your decision to register for the Program? If so, please provide their name above.

Please list any professional/trade associations to which you belong, if any.

Please indicate any specific dietary needs:

Vegetarian Allergies Other - Please specify _____

Series name _____ Date of first session _____

Credit Card Number

Expiration

MC, VISA or American Express

CVV

I hereby authorize The Strategic CFO, LL to charge the credit card number above in the amount of \$500.

X

Cardholder Signature

Name on Card

Yes, I _____ (please initial) authorize The Strategic CFO, LLC to charge the balance thirty (30) days prior to the start date using the above credit card.

Payment by check. Mail to The Strategic CFO, LLC, 952 Echo Lane, Suite 240, Houston, TX 77024.

By signing below, I certify that I have read and agree to all of the attached terms and condntions, and I also agree that:

(i) my deposit is non-refundable;

(ii) the balance of my Program fee is due thirty (30) days prior to the date of the first session noted above; and

(iii) once I attend the first session none of the Program fee is refundable or transferrable and there is no credit for missed sessions.

X

Signature

Date



Terms and Conditions

The materials and concepts of The Strategic CFO™ Coaching Program ("Program") are designed to help you achieve extraordinary goals. In order to assist us in maintaining the unique value you will experience as a participant in the Program, you agree to the following terms and conditions.

Fee Schedule

The fee for the Program is \$3,500. A deposit of \$500 is due with the completed application form. The balance is due thirty (30) days prior to the beginning date of the first session. Upon receipt of the balance, program materials will be sent to you.

Conditions Of My Application

I agree to attend the four (4) sessions for which I am applying, which will take place within a one-year period that begins as of the date of the first session noted in my application. There is no credit for missed sessions. My enrollment is subject to the program fee being paid in full.

Helping To Protect Our Intellectual Property

I agree that any reproduction, presentation, distribution, transmission or commercial use of the concepts, strategies, methods, tools, materials and all other trademarks, copyrights and other intellectual property owned by The Strategic CFO, LLP ("The Strategic CFO™") in any media, now known or hereafter invented, is prohibited without the express written permission of The Strategic CFO™.

Protecting Your Personal Information

I understand that The Strategic CFO™ does not rent, sell or otherwise disclose personal information about its clients to third parties, and will use its best efforts to protect my personal information against loss and unauthorized use; therefore, I release The Strategic CFO™ and its directors, officers, agents and employees from any liability due to disclosure or use of this information.

Some Of The Rights Reserved By The Strategic CFO™

I agree that The Strategic CFO™ has the right to reschedule workshops and/or substitute coaches.

Responsibility For My Decisions

I understand the Program is not a substitute for the advice of any of my personal or professional advisors; therefore, I agree that all of my decisions and actions, and their consequences, are entirely my own responsibility.