

# Carly Wise

## Certified EFT Practitioner

Phone: (714) 642-0901

carlywise.com

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### Client Agreement & Disclosure Statement

Thank you for your interest in working as a client with Carly Wise, either in person or via distance by telephone, Zoom, or another electronic platform, whichever is applicable. Carly Wise is providing you with the following information so you can make an informed choice about your decision to engage her services. Please read this information carefully and let Carly Wise know if there is any part you do not understand.

#### 1. Services Offered

Carly Wise provides her services under California's Health Care Freedom Act. She specializes in working with women to help them deconstruct their current belief systems that no longer serve them so that they can create new empowering beliefs systems more in alignment with their authentic selves. Her intent is to assist clients in releasing negative thoughts, limiting beliefs, and mental and emotional obstacles that may be interfering with their thinking and to help them communicate with their heart's desires.

#### 2. Theoretical Approach

Carly Wise offers an innovative energy-based coaching and self-help technique based on the newly emerging field of energy psychology called ***Emotional Freedom Techniques*** or ***EFT/Tapping***. EFT/Tapping seeks to address imbalances within a person's energy system, as well as the energetic influence of thoughts, beliefs, and emotions on the body. The prevailing premise of EFT/Tapping is that the cause of all negative emotions is a disruption in the body's energy system. It is believed that EFT/Tapping helps clear these disruptions; thereby restoring the flow and balance of the body's electromagnetic and more subtle energies. EFT/Tapping uses the ancient Chinese meridian system with a gentle tapping procedure which stimulates designated meridian end points on the face, head and upper body while saying specific phrases and focusing on issues of emotional intensity in order to release the intensity and reframe the issues.

Although EFT/Tapping appears to have promising wellness benefits and there is a growing amount of valid scientific research indicating that EFT/Tapping meets the criteria to be considered an evidence-based technique, especially for managing stress, it has yet to be fully accepted by the mainstream Western academic, medical, and psychological communities. Consequently, EFT/Tapping is currently not officially identified as an evidence-based technique and may be considered experimental. Due to EFT/Tapping's experimental nature the extent of its effectiveness, as well as its risk and benefits, are not fully known. EFT/Tapping is self-regulated and the State of California does not license, certify or register practitioners of EFT/Tapping and considers it to be a *complementary* and *alternative* wellness approach. If you ever have questions or concerns about EFT/Tapping, please feel free to ask Carly Wise for further resources or references.

#### 3. Nature of the Relationship

***By signing this document, you understand Carly Wise is offering her services solely as a Certified EFT Practitioner. She is not a psychologist, psychotherapist, physician, or other licensed health care provider nor are her services licensed by the State of California. Under Sections 2053.5 and 2053.6 of California's Business and Professions Code, Carly Wise can offer you her services a Certified EFT Practitioner, subject to the requirements and restrictions that are described fully therein.***

#### **4. Other Important Information**

Please be advised Carly Wise's services are not intended to be substitutes for psychological or medical diagnosis and treatment and they do not replace the services of licensed health care providers. You agree to consult with your licensed health care provider for any specific health care issues or problems. Further, you understand that Carly Wise may suggest you contact your licensed health care provider, if she believes it's advisable. In addition, you understand that any information shared during your session(s) is not to be considered a recommendation that you stop seeing any of your licensed health care providers or using prescribed medication, if any, without consulting with your licensed health care provider, even if after a session it appears and indicates that such treatment or medication is unnecessary.

#### **5. Outcome Expectations/Risk & Benefits**

Participation in sessions can result in a number of benefits to you, including improvement and/or resolution of the specific concerns that led you to seek help. However, working toward these benefits requires effort on your part. Most clients report positive outcomes after a session, often feeling peaceful and relaxed. However, it's not known how you will personally respond to using EFT/Tapping. Therefore, it's not possible to guarantee any specific results regarding your goals. However, Carly Wise will work with you to achieve the best possible results for you.

Although EFT/Tapping is considered gentle and non-invasive, it's possible during or after your session to experience some physical discomfort or emotional distress that can be perceived as negative. It's also possible to experience some emotional distress and physical discomfort related to stressful or overwhelming experiences you may have had earlier in your life. Unresolved memories may also surface and emotional material may continue to surface after a session and give indication of other issues or incidents that may need to be addressed. You agree to promptly inform Carly Wise if you experience any emotional distress and/or physical discomfort during or after a session. If appropriate, she may be able to help refer you to an appropriate licensed health care provider for further assistance. In using EFT/Tapping, it's possible that previously vivid or traumatic memories may fade which is a positive outcome. However, this could adversely impact your ability to provide legal testimony that carries the same emotional impact as prior to applying EFT/Tapping regarding a traumatic incident.

#### **6. In-Person Sessions**

If you are having an in-person session, you understand that you will be tapping on your own body and Carly Wise will help guide you by instructing you where to tap while saying specific phrases based on the issues that are being worked on. If you are not able to "tap" for yourself, then Carly Wise may need to "tap" for you. In such a rare event, she will ask for your permission prior to tapping on your body. If you have any reservations about physical touching as described above, please let Carly Wise know.

#### **7. Confidentiality**

Except as provided below, Carly Wise will maintain your confidentiality and will not disclose any information you share with her during your session(s) without your prior written permission. You may direct her to share information with whomever you choose and you can revoke that permission at any time. Carly Wise will break confidentiality if she believes you may harm yourself or another, if she is required to do so by law such as a court order or to report abuse or neglect of a child, dependent, or older adult. ***Further, please be advised that if any communication regarding your session(s) is conducted by phone or over Zoom, or other electronic platform, it is not possible to guarantee the confidentiality of the information contained in any of these communications.***

#### **Acknowledgment and Consent to Receive Services**

By signing this document, you agree that Carly Wise has disclosed to you sufficient information to enable you to decide to engage or not engage her services. You have considered all of the above information and the attached ***Additional Client Information/Office Policies & Procedures*** document which is incorporated herein by reference and made part of this Agreement and have obtained whatever information or professional advice you deem necessary to make an informed decision.

You understand that your consent to the nature of your session(s) is given voluntarily, without coercion, and may be withdrawn at any time in the future. You represent that you are competent and able to understand the nature and consequences of the proposed session(s) and agree to be personally responsible for the fees related thereto.

You have discussed with Carly Wise the nature of the services to be provided and you understand she is only offering her services as a Certified EFT Practitioner. Further, you understand your relationship with Carly Wise is not to be construed as medical treatment, psychotherapy, psychological counseling, or any type of therapy, nor is it a substitute for these services. Carly Wise has disclosed to you that she is not a licensed health care provider and her services are not licensed by the State of California

You understand that EFT/Tapping is a relatively new wellness approach and the extent of its effectiveness, as well as its risks and benefits are not fully known. Therefore, you agree to assume and accept full responsibility for any and all risks associated with using EFT/Tapping. Further, you agree and understand this Agreement is intended to be a complete unconditional release of liability and assumption of risk to the greatest extent permitted by law.

Any and all matters in dispute between the parties to this Agreement, whether arising from or relating to this Agreement itself, or arising from alleged extra-contractual facts prior to, during, or subsequent to this Agreement, including, without limitation, fraud, misrepresentation, negligence or any other alleged tort or violation of the contract, shall be governed by, construed, and enforced in accordance with the laws of State of California without regard to conflicts of law doctrines and regardless of the legal theory upon which such matter is asserted. This Agreement shall be binding upon you and your heir(s) and legal representative(s).

By signing in the space provided below, you knowingly, voluntarily, and intelligently assume these risks and agree to forever fully release, indemnify, hold harmless and defend Carly Wise, her employees, agents, representatives, consultants, and others associated with Carly Wise from and against any and all claims or liability, of whatsoever kind or nature, which you may have for any loss, damage, or injury, including without limitation, physical, emotional, mental, legal, financial, or personal, arising out of or in connection with your sessions(s) and the use of EFT/Tapping.

\_\_\_\_\_  
Client Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Signature

I am the parent or legal guardian of the above-named minor, and I consent to and join in this Client Agreement & Disclosure Statement on behalf of said minor.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_  
Parent/Legal Guardian

***If you are submitting this Client Agreement & Disclosure Statement electronically, typing your name in the space provided above will be considered your signature and constitute your acceptance and agreement of this Client Agreement & Disclosure Statement. This Client Agreement & Disclosure Statement becomes effective as of the date signed above.***

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**Additional Client Information/Office Policies & Procedures**  
**Attachment to Client Agreement & Disclosure Statement**

**1. Cancellations**

Scheduling of sessions involves the reservation of time specifically for you. Therefore, once a session is scheduled, you will be expected to pay for it unless you provide 24 hours' advance notice of cancellation. If you miss a session without canceling, or cancel with less than 24 hours' notice, then you will forfeit the funds for that session with the exception of emergency situations which will be discussed on an individual basis.

**2. Training**

Certified EFT Tapping Practitioner by EFT International through EFT Tapping Training Institute, 2021

**3. Packages, Subscriptions, Individual Sessions & Fees**

**Packages**

- Goddess Genesis Package, includes an initial 35-minute Discovery Session followed by 6 one hour tapping sessions. Fee: \$649
  
- The Goddess Journey Package, includes an initial 35 -minute Discovery Session followed by 11 one hour tapping sessions. Fee: \$1,147

*The Goddess Genesis Package must be used within 6 months of purchase or the sessions are forfeited and no refunds are provided. The Goddess Journey Package must be used within 12 months of purchase or the sessions are forfeited and no refunds are provided. In the event you are unable to complete all of the sessions in your Package within its specified time frame due to illness, injury, or an emergency situation, then you and Carly Wise will discuss and come to a mutual agreement regarding extending the time for you to complete the sessions in your Package.*

**The following are only available to established clients who have completed a package.**

**Subscriptions**

- Goddess Account – one 60-minute tapping session per month. Fee \$100 per month
- Goddess Maintenance – two 60-minute tapping sessions per month. Fee \$200 per month
- Goddess Weekly – one 60-minute tapping session per week. Fee \$100 per week

**Individual Sessions**

- Goddess Check-in – one 60-minute tapping session. Fee \$100

*An individual session must be used within 3 months of purchasing the session or the session is forfeited and no refund is provided*

**4. Payment Policies**

Packages, Subscriptions, and single sessions can only be purchased using the booking system at carlywise.com This Client Agreement must be signed and payment must be received at least 48 hours in advance of the initial Discovery Session. If this Client Agreement and payment are not received at least 48 hours in advance, then the initial Discovery Session must be rescheduled. Payment is expected prior to established client subscription sessions and/or single session appointments, whichever is applicable, unless previous arrangements have been made.

## **5. Distance Sessions**

If you and Carly Wise have agreed to conduct sessions via Zoom, or another electronic platform, she will provide you with a link via email or text in order to connect with her for the session. If for any reason, Carly Wise has not connected with you by phone or via the internet link provided for the session within 15 minutes of the schedule start time of such session, then your session will need to be rescheduled subject to mutual availability. If you are having a distance session and encounter a disruption of the session due to technical or/ weather related difficulties, Carly Wise and you agree to make every reasonable effort to re-establish the connection in order to continue and complete the session. However, in the rare event Carly Wise and you are not successful in re-connecting and completing the session, you shall be obligated to pay pro-rata the applicable session fee based on the amount of time Carly Wise and you were actually able to conduct the session.

## **6. Communication between Appointments**

Carly Wise is available by email [Carlylynwise@gmail.com](mailto:Carlylynwise@gmail.com) between your scheduled appointments if you need to cancel or reschedule.