



**Productivity & Personal Consulting  
Estate Organizer  
NAPO & CRTS**

**Policies and Procedures for Kimberly Meredith, Effectiveness Coach, Simplify Our Life.**

As a Professional Organizer, Kimberly has established the policies below to ensure that all clients are aware of the aspects of our work together to complete the desired results.

**Confidentiality and Time**

- Kimberly and the client will respect each other's confidentiality, both business and personal, proprietary materials and approaches.
- Kimberly will ask for permission for any materials to be used for lectures, promotions, writing, or other purposes.
- Kimberly has a two (2) hour minimum requirement of time for single session hands-on organizing. Coaching requires four (4) one hour phone calls, per month, with unlimited e-mail access. On-site Analysis Plan requires (1) hour of location assessment with written plan for a total of \$300.00.
- Internet coaching and organizing is charged by the hour, beginning with the response to your original e-mail. Estate Organizing is billable by the hour, with only non-binding estimates for specific project areas. Relocation & Transitions are billable by the hour, with a non-binding estimate provided for an estimated cost analysis. Time begins when we arrive and ends when we leave the property.
- Travel is charged separately and applies to each session. Product purchases are invoiced at cost, with travel time for purchasing products.
- Focus is the utmost importance during our working sessions. Please make accommodations for incoming phone calls, appointments, and child/pet care to ensure our most productive work together.
- Under most circumstances, time will begin when we arrive at the property and end when we leave the property. If out of state travel is required, travel expenses will be charged in addition to daily rate.

**Accountabilities (Working together)**

The nature of my work requires that you and I collaborate as peers. I do not work *for* you, rather *with* you. I commit to helping you achieve your objectives and I ask for the same commitment from you. My work offers high content and high transfer of skills and this is reliant upon us working together as a team. Based on this understanding and our joint commitment to the objectives agreed upon, our accountabilities are:

*My accountability includes:*

- Available during the time(s) I commit to you.
- Provision of all supplies agreed upon together to complete our organizing work together.
- Delivery of quality services.
- Transfer of my knowledge and skills necessary to reach your objectives.

**Kimberly Meredith  
Effectiveness Coach – Simplify Our Life  
PO Box 847  
Chesterfield, MO 63006  
314-229-3798**

*Your accountability includes:*

- Provide all relevant information that will affect our work together, for and during the project.
- Following through on what you committed to work on in the project.
- Payment made payable to Kimberly Meredith for services completed and products purchased.

*Joint accountability includes:*

- We will alert each other of anything we learn that may materially affect the success of our work together.
- We will achieve reasonable accommodation for conflicts, unforeseen events, and other priorities.
- We will make every effort to reschedule appointments at least 48 hours in advance when schedule conflicts arise. If a cancellation occurs, without proper notification, a minimum fee of \$200.00 for that session will be invoiced & payable.

### **Terms & Conditions**

Hourly rate is \$ 110.00. A 20% deposit is required, by check or credit card, to commence work. The balance is due at the end of each session or upon receipt of invoice, whichever is agreed upon between the parties. Subcontracted Organizers are paid directly by the client at the subcontracted rate for that organizer. Discounts are given only at the discretion of Kimberly Meredith. Payment by credit card requires a 3% convenience fee added to the total of the invoice at the end of the invoice. Client shall release, defend, indemnify, save and hold harmless Kimberly Meredith, Effectiveness Coach, Simplify Our Life and the Independent Contractors from and against any and all liability of every kind, nature, and description that Client suffers, sustains or incurs by reason of Kimberly Meredith, Effectiveness Coach, Simplify Our Life services that are being rendered pursuant to this contract. Any late fees or collection and/or legal fees to be assessed and paid by Client in acceptance of this agreement, in the event of late or uncollected payment of services and products rendered.

Acceptance

Your signature below indicates acceptance of these terms, policies and procedures.

By:

\_\_\_\_\_  
Kimberly Meredith  
Professional Organizer, CRTS

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client

\_\_\_\_\_  
Date

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