

Client Services Agreement

Coastal AI Consultancy

IMPORTANT NOTICE: This template is provided for informational purposes only and does not constitute legal advice. Coastal AI recommends having this agreement reviewed by a qualified attorney before use. Laws vary by jurisdiction and this template may need to be adapted for your specific circumstances.

CLIENT SERVICES AGREEMENT

This Client Services Agreement (“Agreement”) is entered into as of DATE by and between:

Service Provider: Coastal AI Consultancy (“Coastal AI”) Contact: michelle@coastalaiconsultancy.com

Client: CLINIC LEGAL NAME [CLINIC ADDRESS] [CITY, STATE/PROVINCE, ZIP/POSTAL CODE] Contact: [CLIENT EMAIL]

Collectively referred to as the “Parties.”

1. Services

1.1 Scope of Services. Coastal AI agrees to provide the following AI implementation and consultancy services (“Services”) as selected by the Client:

AI Voice Agent (24/7 Front Desk Automation) AI Patient Reactivation Campaigns Predictive CRM & Marketing Automation AI Virtual Consultation & Skin Analysis AI Reputation Management & Review Generation Other: [SPECIFY]

1.2 Service Plan. Client has selected the following service plan:

Starter Plan — USD 1,497/month Growth Plan — USD 2,997/month Full Suite Plan — USD 4,997/month Custom Plan — USD [AMOUNT]/month (as agreed in

writing)

1.3 Deliverables. Specific deliverables, timelines, and success metrics for the selected Services are outlined in the Onboarding Pack provided to Client upon execution of this Agreement.

2. Term and Termination

2.1 Term. This Agreement commences on the Effective Date and continues on a month-to-month basis until terminated by either Party in accordance with Section 2.2.

2.2 Termination. Either Party may terminate this Agreement for any reason by providing thirty (30) days written notice to the other Party via email. Notice sent to Coastal AI must be directed to michelle@coastalaiconsultancy.com. Notice sent to Client must be directed to the email address provided above.

2.3 Termination for Cause. Either Party may terminate this Agreement immediately upon written notice if the other Party materially breaches this Agreement and fails to cure such breach within ten (10) business days of receiving written notice of the breach.

2.4 Effect of Termination. Upon termination, Coastal AI will provide Client with all account credentials, data, and documentation necessary for Client to continue operating any implemented tools independently. Coastal AI will return or destroy any Client data in its possession within thirty (30) days of termination.

3. Fees and Payment

3.1 Monthly Fee. Client agrees to pay Coastal AI the monthly fee specified in Section 1.2, payable in advance on the first business day of each calendar month.

3.2 Payment Method. Payment shall be made via [SPECIFY: bank transfer / credit card / ACH / other]. Coastal AI will provide invoices at least five (5) business days before each payment due date.

3.3 Late Payment. Invoices not paid within fifteen (15) days of the due date may incur a late fee of 1.5% per month on the outstanding balance. Coastal AI reserves the right

to suspend Services for accounts more than thirty (30) days overdue.

3.4 Price Adjustments. Coastal AI may adjust its fees with sixty (60) days written notice to Client. Client may terminate this Agreement without penalty if they do not agree to the adjusted fees, provided written notice is given within thirty (30) days of receiving the fee adjustment notice.

3.5 Expenses. Any third-party platform fees, software subscriptions, or other expenses required to deliver the Services will be disclosed to Client in advance and are not included in the monthly fee unless expressly stated in writing.

4. Client Responsibilities

4.1 Access and Cooperation. Client agrees to provide Coastal AI with timely access to all systems, platforms, and information reasonably required to deliver the Services, including but not limited to: practice management software, Google Business Profile, website, email marketing platforms, and patient database exports.

4.2 Accuracy of Information. Client is responsible for the accuracy of all information provided to Coastal AI. Coastal AI is not liable for errors resulting from inaccurate or incomplete information provided by Client.

4.3 Staff Cooperation. Client agrees to ensure that relevant staff members participate in training sessions and adopt implemented tools as directed by Coastal AI.

4.4 Compliance. Client is responsible for ensuring that their use of all implemented AI tools complies with all applicable laws and regulations, including but not limited to HIPAA (US) and PIPEDA (Canada). Coastal AI will only recommend and implement tools that are HIPAA-compliant, but ultimate compliance responsibility rests with the Client.

5. Intellectual Property

5.1 Client Data. All patient data, clinic data, and proprietary business information provided by Client to Coastal AI remains the exclusive property of Client. Coastal AI will not sell, share, or use Client data for any purpose other than delivering the Services.

5.2 Coastal AI Materials. All methodologies, frameworks, templates, and proprietary processes developed by Coastal AI remain the intellectual property of Coastal AI. Client receives a non-exclusive licence to use any deliverables created specifically for Client during the term of this Agreement.

5.3 Third-Party Platforms. All accounts created on third-party platforms (e.g., booking software, CRM platforms, review management tools) are created in Client's name and remain Client's property. Coastal AI is granted access solely for the purpose of delivering the Services.

6. Confidentiality

6.1 Mutual Confidentiality. Each Party agrees to keep confidential all non-public information received from the other Party ("Confidential Information") and to use such information only for the purposes of this Agreement.

6.2 Exceptions. Confidentiality obligations do not apply to information that: (a) is or becomes publicly available through no fault of the receiving Party; (b) was already known to the receiving Party before disclosure; © is independently developed by the receiving Party; or (d) is required to be disclosed by law or court order.

6.3 Duration. Confidentiality obligations survive termination of this Agreement for a period of two (2) years.

7. Warranties and Disclaimers

7.1 Coastal AI Warranties. Coastal AI warrants that: (a) it has the right to enter into this Agreement; (b) the Services will be performed in a professional and workmanlike manner; and © all recommended tools are HIPAA-compliant at the time of recommendation.

7.2 No Guarantee of Results. Coastal AI does not guarantee specific revenue outcomes, patient acquisition numbers, or other business results. All projections and estimates provided are based on industry data and past client results and are not guarantees of future performance.

7.3 Disclaimer. EXCEPT AS EXPRESSLY SET FORTH IN THIS AGREEMENT, COASTAL AI PROVIDES THE SERVICES “AS IS” AND DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

8. Limitation of Liability

8.1 In no event shall either Party be liable to the other for any indirect, incidental, special, consequential, or punitive damages arising out of or related to this Agreement, even if advised of the possibility of such damages.

8.2 Coastal AI’s total liability to Client for any claims arising under this Agreement shall not exceed the total fees paid by Client to Coastal AI in the three (3) months preceding the claim.

9. General Provisions

9.1 Governing Law. This Agreement shall be governed by the laws of [STATE/PROVINCE], without regard to its conflict of law provisions.

9.2 Dispute Resolution. The Parties agree to attempt to resolve any dispute through good-faith negotiation before pursuing formal legal action. If negotiation fails, disputes shall be resolved through binding arbitration in [CITY, STATE/PROVINCE].

9.3 Entire Agreement. This Agreement, together with the Onboarding Pack, constitutes the entire agreement between the Parties with respect to its subject matter and supersedes all prior agreements and understandings.

9.4 Amendments. This Agreement may only be amended by a written document signed by both Parties.

9.5 Severability. If any provision of this Agreement is found to be unenforceable, the remaining provisions shall continue in full force and effect.

9.6 No Waiver. Failure by either Party to enforce any provision of this Agreement shall not constitute a waiver of that Party’s right to enforce such provision in the future.

Signatures

By signing below, both Parties agree to the terms and conditions of this Agreement.

COASTAL AI CONSULTANCY

Signature: _____ Name: Michelle [Last Name] Title: Founder
Date: _____

CLIENT

Signature: _____ Name: _____
Title: _____ Clinic Name: _____
Date: _____

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