

My Integrated Health Clinic

Life Coaching Intake Form

Dear Valued Client,

Congratulations on your choice to focus time and energy on your personal and professional growth and fulfillment! Policies and procedures are outlined in this document as well as a few requests. **Please INITIAL the underlined spaces below:**

The Coaching Structure

- _____ Coaching provides a structure of support, to help you focus and achieve the outcomes you desire. As a client, YOU bring the agenda to each coaching session.
- _____ The underlying principal of coaching is that YOU have the answers that are most valuable and relevant to your life. The coach will ask you questions to help you find the answers that are most valuable to you.
- _____ As your coach, I promise to be honest, forthright and bold. My natural style is intuitive, directive, action-oriented, as well as open and compassionate. As a client, you understand that the power of the coaching relationship can only be granted by you. If it is not working for you, you agree to be responsible and identify what is not working so the relationship can be redesigned.
- _____ Periodic checkpoints will be conducted to affirm that the coaching relationship is meeting expectations. At the end of the committed period, we will review coaching outcomes and progress.

Payment

- _____ Payment is due upon arrival to our office. Please be proactive in ensuring your payments are on time.

Scheduling

- _____ Coaching Sessions are scheduled in advance. If clients are unable to keep a coaching appointment, and do not provide 24 hours notice, the coaching session will be considered a paid appointment.

Confidentiality

- _____ The coaching relationship is a confidential relationship. All information provided during the course of the coaching remains private unless agreed by the coach and the client. You are free to share whatever you choose from our sessions with anyone you wish.
- _____ As your coach, it is essential for me to be aware of past and present events, addictions, conditions, medications, and/or ways of thinking that influence your life now (i.e. are you in a 12 step program? In therapy? Do you have a learning disability?) Please list any in the space below:

In Between Sessions

- _____ Successes, failures, communications, and accountabilities and more can be handled through e-mail. please use it to stay in touch.

Authorization

Your Signature below indicates that you understand that content of this agreement and accept its terms.

Name _____ Signature: _____ Date: _____

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Date: _____

Last Name: _____ First Name: _____ Sex: M / F

Address: _____ City: _____ Postal Code: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____ Cell Phone Provider: _____

E-mail: _____ Occupation: _____ Marital Status: _____

No. of children: _____ Birth date (DD/MM/YYYY): _____

By whom were you referred? _____

These questions will serve as a jumping-off point for our initial Discovery session. There are no right or wrong answers so relax and enjoy the exploration. Write as much or as little as feels appropriate for you.

YOUR CURRENT LIFE

What is your greatest gift or talent?

Do you have any real-life heroes whose qualities you would want to model in your own life? If so, what are those qualities?

What absolutely "grinds" you or rubs you the wrong way?

Choose a moment in your life that you hold as a true "peak experience." What was it? What made it so special?

Describe your spiritual beliefs and the importance of spirituality and/or religion in your life.

Name things that you have been procrastinating about.

In which area of your life would you most like to see change in the coming year?

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What is most fulfilling for you right now in your life and work?

What's missing in your life? What would make your life more fulfilling?

What will be the consequences if you simply keep going the way you are going now?

If you were to start from scratch how would you create your work and life to be completely sustainable?

What accomplishment must occur during your lifetime to consider your life to have been satisfying and well lived?

If there were a secret passion in your life, what would it be?

What would you do if you knew you could not fail?

Why do you want a coach? What brought you here?

What motivates you to action?

Assuming our coaching relationship was successful beyond your wildest imagination. What would have made it that way?

If you trusted your coach enough to tell them how to manage you most effectively, what tips would you give?

Where don't you want me to go?

Is there anything you need to know about me that will contribute to your receiving the maximum benefit available from our coaching relationship?

What three things would you like to work on immediately in our coaching sessions?