



Client Contact Information

Note: All personal information is held securely in accordance with the appropriate legislation, is confidential and treated appropriately.

Client Information

Mr/Mrs/Miss/Ms/Other _____ Last name _____
Name you like to be called _____
Address _____

Telephone Numbers/Contact Details/Ok to contact at this #?

Home	_____ Y/N	Work	_____ Y/N
Cellphone	_____ Y/N	Pager	_____ Y/N
Fax	_____ Y/N		
Email/s	_____		_____ Y/N
Preferred Contact Mode/s	_____		

Employment/Education Information

Highest Degree Achieved? _____ Years in School? _____
Occupation _____
Employer Name _____

Personal Information

Date of Birth _____ Marital Status _____
No. of Children _____ Other Important Family Members? _____
Significant Other's Name _____
Significant Others Date of Birth _____
Significant Dates (e.g. Wedding anniversary) _____

Name(s) and Age(s) of Child(ren) 1 _____

Emergency Contact

Name: _____
Phone #: _____
Address: _____

Relationship: _____

Intake Questions:

What do you most want to achieve for yourself in your life/career?



Client Contact Information

What if anything is missing in order to achieve this?

What would you say have been your 3 greatest accomplishments to date?

1.

2.

3.

EXPECTATIONS:

What do you expect to achieve in life as a result of hiring me as your life coach?

Your History:

What is the hardest thing in your life that you have had to overcome?

What major transitions have you had in the past two years? (Example: Entering or approaching a different age, a new or different relationship, job role, residence, a change in children's ages/stages, etc.)

Have you worked with a coach before or a similar one-on-one adult relationship (e.g. tennis coach, piano teacher, and therapist)? If so, what worked well for you and what did not work in the relationship(s)?

If you have a mental health/psychiatric history, do you feel like the issues for which you sought treatment are under control? Please list any conditions which have been problematic for you, now or in the past:

Your Life Story / History: What would you like to share with me? What would help me know you better?



Client Contact Information

Looking at the past six months of your life, do you like the direction your life is moving in? Explain.

Is your life one of your choosing? If not, which parts are being chosen for you?
What is a dream or goal you have given up on?

What do you think is NOT possible to achieve in your lifetime that you wish you could?

What part of yourself, if any, have you given up on?

On a scale of 1 to 10 with 10 high, rate the quality of your life today. _____/10

If you reach the age of 95 and continue to live your life and order your time the way you are right now, what regrets do you think you will have? (Tip: complete the statement "I wish I had...") Do not include things from the past—only things you will regret if you continue your exact present path.

Tolerations:

List five things that you're personally tolerating or putting up with in your life at present. (Examples: information you can't find, clutter, rude friends, tight shoes, dented car, job dissatisfaction, dead plants, broken equipment, cranky people in your life etc.)

1. _____
2. _____
3. _____
4. _____
5. _____

What are your primary stressors? (What stresses you out?)



Client Contact Information

On a scale of 1 to 10, 10 high, rate the amount of stress in your life right now. _____ /10

Potential and Possibility:

Do you have a personal or professional vision? If so, what is it?

What would you like to contribute to the world?

What would you like to give to people?

What is your definition of success?

What would be your personal or professional legacy, which you would like to give to others, when it's all been said and done?

Other Background:

What do you spend most of your leisure time doing? _____

How do you create fun in your life? _____

What, in your heart of hearts, is the dream you long to see come true? _____



Client Contact Information

Supporting you:

What supports you if you get behind on your goals?

What types of approaches discourage you or take away motivation?

Here are ways of coaching clients. Which ones appeal to you?

- Brainstorming strategies together
- Support, encouragement and validation
- Insight into who you are and your potential
- Painting a vision of what you can become or accomplish
- Exploring and removing blocks and obstacles to your success
- Accountability; checking up on goals
- Working through self-improvement programs together
- Suggesting or designing action steps
- Teaching/Practicing skills associated with success

Comments/Anything else you'd like me to know or want to tell me?