

Client Profile

Read and complete the following.

LIFE PURPOSE

What do you want for yourself, for others, for life, personally? What is truly most important to you? Use the worksheet to assist.

BUSINESS MISSION

What do you want, professionally, for your clients and others? Why do you do what you do? What do you offer that turns you on? Use the enclosed worksheet.

PERSONAL NEEDS

Please take the NeedLess Test and complete the following list of your top 4 Needs. Test score _____

_____	satisfied by	_____
_____	satisfied by	_____
_____	satisfied by	_____
_____	satisfied by	_____

CORE VALUES

Please take the Tru Values test and complete the following list of your top 4 values. Test score _____

_____	expressed by	_____
_____	expressed by	_____
_____	expressed by	_____
_____	expressed by	_____

PERSONAL & PROFESSIONAL STRENGTHS

Evaluate your strengths on the Strengths Inventory and list the top 5 below.

PRIMARY ATTACHMENTS

Please take the Attachment Index test. List your 3 primary attachments below. Test score: _____

FALSE ASSUMPTION/LIE

Is there a false assumption (something you've been holding to be true, but maybe isn't) that is time to re-look at? Is there a basic "lie" that is time to admit?

OTHER TEST SCORES

Score as of				
	Now			
Co-Dependent				
15 Conditions				
Stress Index				
Coachability				
Spend/Debt				
Clean Sweep Program (# of TRUE responses)				
Physical				
Wellness				
Money				
Relationships				
TOTAL TRUE				

You and your coach will complete this section at a later time. Keep the enclosed Personal Profile until that time

AREAS OF LIFE

Quality Score as of				
Health				
Career				
Relationships				
Personal Dev				
Fun/Pleasure				
Money				
1 = Low Quality --> 10 = High Quality				

10 DAILY HABITS

Clients who take great care of themselves are able to achieve more with less cost. Make a list of the 10 daily habits that will keep you well. Use the Daily Habits tracking sheet if desired.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

- 8.
- 9.
- 10.

LIGHTEN UP!

Most of us have a couple of extra undertakings, promises or projects that we'd do well to suspend for six months to give us the freedom and space to have the current ones be effortless and more enjoyable.

- 1.
- 2.
- 3.

PERSONAL GOALS

Please complete the Goals/Skills Checklist and summarize the higher-priority ones below.

Health and Emotional Balance

- 1.
- 2.

Career/Business

- 1.
- 2.

Relationships/Family

- 1.
- 2.

Personal Development/New Skills

- 1.
- 2.

Fun/Pleasure

- 1.
- 2.

Money

- 1.
- 2.

BUSINESS GOALS

Use the Business Problem checklist and/or the Biz Win assessment test to prompt ideas for business or company goals. List the top 3 below.

- 1.
- 2.
- 3.

What are you facing right now which needs immediate focus or resolution?