

Greetings!

I'm excited to be working with you as your coach while you search for the "missing piece" to make your life more complete.

In order for us to get off to a solid start I would like you to spend some time completing the following form. I'm sure that some of the questions will have you pause and reflect, while others will be easier to answer. From my experience as a coach, I have often found that answering these questions is a great starting point to determine where you'd like to go in coaching.

Set aside some quality time to complete the questions and please e-mail the form back to me the day before our first session.

I'm really looking forward to coaching you on this wonderful new adventure.

Your Coach,

Client Information Form

Please fill out the form below by placing your responses in the gray boxes.

First Name	Last Name
Address	City
State/Province	Postal Code
Country	Company
Title	Middle Name
Work Phone	Home Phone
Mobile Phone	Fax Phone
Email	2nd Email
Occupation	Referred By
Birthday	Marital Status
Religious affiliation	Spouse Name
Anniversary	Children's Names and Birthdays

Your Goals

What are the three biggest changes you want to make in your life in the next 3 months?

- 1.
- 2.
- 3.

What are the three biggest changes you want to make in your life over the next 3 years?

- 1.
- 2.
- 3.

What do you most want to achieve? And do you feel ready for it?

Your History

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

- 1.
- 2.
- 3.

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

Who are or have been your major role models?

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

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

Improvements

List improvements you would like to make in the following areas of your life.

Family/home life:

Financial situation:

Career or Business life:

Personal Character:

Relationships:

Leisure time:

Self-care:

Learning:

Your Life

Who are the key people in your life and what do they provide for you?

Is your life one of your choosing? If not, which parts are being chosen for you?

What is your favorite part of your typical day?

What is your least favorite part of your typical day?

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

On a scale of 1 to 10, 10 high, 1 being the lowest and 10 being the highest, rate the amount of stress in your life right now. 1

What are your primary stressors?

List five things that you are tolerating or putting up with in your life at present. (examples: info. you can't find, clutter, rude friends, poor lighting, tight shoes, dented car, job dissatisfaction, dead plants, broken equipments, old appliances, etc.)

- 1.
- 2.
- 3.
- 4.
- 5.

Yourself

List five adjectives that describe you at your best.

- 1.
- 2.
- 3.
- 4.
- 5.

List five adjectives that describe you at your worst.

- 1.
- 2.
- 3.
- 4.
- 5.

What are your 3 major concerns/fears about yourself?

- 1.
- 2.
- 3.

What are your 3 major concerns/fears about life?

- 1.
- 2.
- 3.

What motivates you?

What are you learning/accepting about yourself at present?

Coaching You

What would you like me to do if you get behind on your goals?

Do you understand that if you miss a coaching session without notice, I will be unable to make it up? Yes

Do you understand that if you are late with payments a \$10 late fee will be charged? Yes

How will you know when you are receiving value (i.e. your money's worth) from the coaching process?

Are you able and willing to pay the monthly coaching fee? Yes

What types of approaches discourage you or take away motivation?

Are there any alterations in my natural style you wish me to make when working with you?

Do you enjoy self-assessments and improvement programs? Yes

Here are ways coaching clients use me. Which 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

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

What is a dream or goal you have given up on?

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

On a scale of 1 to 10, 1 being the lowest and 10 being the highest, rate the quality of your life today.

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.

Your Tastes

Favorite Color(s):

Style of Decorating or Clothing (examples: Traditional, Sporty, Classic, Romantic, Dramatic, Contemporary, Eclectic...anything that describes your style):

Collections (if you have any):

Hobbies:

Favorite Authors, Types of Books or Magazines:

Types of Music you Enjoy, including favorite artists:

Foods/Drinks/Flavors:

Scents (as in, Vanilla, Berry, Old Spice, floral, woody, "new car", etc.)