

Client Profile

Contact Information

Name _____

Address _____

City _____ State _____ Zip _____

Main Phone Number _____

Email _____ Website _____

Personal Information

Birthdate _____

Marital Status _____ Children _____

Education _____

Employment/Occupation _____

Health History: Present Health: _____ Excellent _____ Good _____ Fair _____ Poor _____

_____ I am presently taking medication(s) (specify) _____

_____ I have had serious illness/injury (specify) _____

Have you ever been in Counseling or Coaching before? _____ Yes _____ No

If yes, please explain (individual counseling, group counseling, career planning, etc.)

What was the outcome of your experience?

Personal Strengths: (Please list at least three of your strengths)

- 1.
- 2.
- 3.

Coaching Goals: List three goals in order of priority

- 1.
- 2.
- 3.

Is there anything more you would like me to know?

Session Policies

Session Time. Sessions are scheduled for 60 minutes in length. I will initiate our calls. If you are late, we will begin when you arrive and end at our scheduled time.

Payment for Sessions:

- The cost for a one-hour face-to face or Skype/Phone session is \$110; longer sessions and any extensive email correspondence will be prorated.
- You must have a Paypal account to pay for distance sessions. I will send you an invoice the day before our appointment. Payment is due 24 hours in advance.
- If we are meeting in person, I accept checks or cash at the time services are rendered.
- Payment for Muse-ings or Creative Package offerings may be paid up front. If not, a payment plan will be set before the sessions begin.

Cancellation: I understand that unanticipated events happen occasionally in everyone's life. In my desire to be consistent, effective and fair to all clients, and out of consideration for everyone's time, I have adopted the following policies:

- Client is responsible for scheduling and attending sessions.
- Please notify as far in advance as possible if you are unable to keep an appointment.
- 24-hour advance notice is required when canceling an appointment, except if an emergency were to occur.
- If you have to cancel and have already paid for the session, we will reschedule and apply the paid amount to the next session.
- If you are unable to give 24 hours advance notice, you will be charged in the amount of the current rate for your scheduled session.

I understand these terms, and authorize charges should I incur cancellation fees.

Signed _____ Dated _____

Printed _____