

CLIENT INTAKE FORM

Name _____

Name you like to be called? _____

Address _____

Phone (Home) _____ (Work) _____

Phone (Mobile) _____ (Fax) _____

E-mail address _____

Occupation _____

Employer's name _____

Date of birth _____ Marital status _____

Significant Other's Name _____

Names and ages of children _____

Name _____	Age _____	Name _____	Age _____
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Name _____	Age _____	Name _____	Age _____
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Name _____	Age _____	Name _____	Age _____
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Name _____	Age _____	Name _____	Age _____
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Name _____	Age _____	Name _____	Age _____
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COMMENTS ON EMBODIES A COACHING MINDSET

How satisfied are you with different areas of your life? Enter a number from 1 to 10 next to each of the following categories, 1, being completely dissatisfied and 10 being you are completely satisfied with this area of life. Assess how you feel today- not how hope to feel or how you felt last week.

1- Completely dissatisfied 10 - I could not be happier

_____	Physical Health
_____	Mental/Emotional Health
_____	Career/Employment Satisfaction
_____	Financial Stability
_____	Marriage/Romantic Relationship
_____	Home Life (Immediate Family)
_____	Extended Family (Relatives, In-laws)
_____	Friends/Social Life
_____	Recreation/Relaxation/Leisure
_____	Lifestyle (Degree of Busyness and Life Balance)
_____	Personal Life Fulfillment
_____	Spiritual Health/Life
_____	Spiritual Life
_____	Physical Comfort (Housing Neighborhood, Possessions, Cars, etc.)

1. What do you hope coaching will do for you?

2. Are you or have you ever been in counseling or therapy?

Yes ☐

No ☐

If yes, please tell me what led you to therapy.

3. What are your current strengths and opportunities?

4. What are the most important things (good or bad) happening in your life right now?

5. Looking back 1 years from today, what has to happen for you to be completely satisfied with your progress over the last year?

6. What is preventing you from achieving this now? In the present?

7. How might you sabotage yourself as you work toward your goals?

8. How might you sabotage the coaching engagement?

9. What, if any, are your questions about coaching?

10. Rate the level of stress in your life on a scale of 1 to 10. (1=low and 10=high)

☐

1

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2

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3

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10

11. What are your primary triggers for stress?

12. What attributes are looking for in a good coach?

13. What is your best quality as a friend or in a friendship?

14. How do you like to be supported or held accountable?

15. What else would you like me to know about you?