

Client Intake Form – Life Coaching

Name _____

Date of Birth: _____ Sex: M ___ F ___

Address: _____

Marital Status (M/D/S): _____ Email: _____

Phone: Home: _____ Work: _____ Cell: _____

Which of the following phone number(s) will be okay to leave messages? Home ___ Work ___ Cell ___

Best time to contact you _____

Briefly describe what you are seeking a life coach for:

How long have these been a concern?

Have you ever had a life coach before? _____ How long ago? _____ Where? _____

For what? _____ Was it helpful? _____

What would you like to get out of having a life coach?

Are you under a doctor's care? If yes name of doctor: _____

Medications: _____

Last medical examination: _____

Presently abusing: Drugs _____ Prescription _____ Alcohol _____

If abusing, when was the last time you used: _____

In Case of Emergency:

Person to Contact: _____ Relationship: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

I give permission for my life coach to contact the above person in the event of an emergency.

Client's signature _____ Date _____

Informed Consent – Life Coaching

Progress notes will be written for every session and the notes will be locked in a secure place. At the point of completion in sessions, progress notes, client's intake form, and any other information on the client will be shredded at the completion of the course.

Life Coaching Qualifications and Theoretical Orientation:

My philosophical approach to coaching is eclectic and holistic in nature. I will employ a variety of techniques from various models, as well as, spiritual techniques such as prayer and scriptures if and when is appropriate and is consistent with a client's value system and beliefs.

Life Coaching Role and Responsibilities:

1. To provide a safe, non-judgmental environment that will promote and foster client's growth, development, increase in self-awareness, and new perspectives.
2. To provide empathy, encouragement, support, and at times, to challenge client's thinking process and self-appraisal when needed.
3. To abide by the codes of ethics held by the life coaching profession.

Confidentiality: the nature, purpose, and limits of confidentiality:

Within limits of the law, information revealed by you during our coaching sessions will be kept strictly confidential and will not be revealed to any other person or agency without your written permission.

You should also know that there are certain situations in which I am required by law to reveal information obtained during coaching to other persons or agencies without your permission. Also, I am not required to inform you of my actions in this regard. These situations are as follows:

1. If you threaten grave or bodily harm or death to self or another person.
2. If you are suicidal.
3. If you reveal information relative to child abuse, child neglect, or elder abuse, I am required by law to report to the appropriate authority.
4. If a court of law issues a legitimate court order (signed by a judge), I am required by law to provide information specifically described in that order.

Client's Rights, Roles, and Responsibilities:

1. The right to give informed consent.
2. The right to ask questions about any procedures used during coaching and to refuse any techniques or interventions that you are uncomfortable with.

3. The right to terminate the therapeutic relationship.
4. The right to privacy—to control when, where, and how much to share.
5. The right to collaborate and be an active participant. This may include but is not limited to engaging in the therapeutic process, setting goals, doing “homework” in preparation for your sessions, and/or to practice what we have covered in our session.
6. The right to access and consent to the release of their progress notes.

Potential Psychological Risks Include:

1. In working to achieve the potential benefits mentioned above, coaching will require that firm efforts be made to change and may involve the experience of significant discomfort. As an example, client may come feeling relatively comfortable and leave feeling annoyed, tired, upset, or vulnerable and defenseless following a session.
2. Outside life may be altered in such a way that significant people in client’s life may have adverse reactions to the changes.

Potential Benefits Include:

1. Increased self-awareness.
2. New perspectives on problems or unused opportunities.
3. Sense of clarity and renewed hope for the future.
4. Probable outcomes resulting from resolving specific concerns brought to the sessions.

By signing below, you have agreed to the terms and conditions stated in this form.

Client’s Name (Please Print)

Client’s Signature (Parent/Legal Guardian must sign if under 18)

Date

Life Coach Signature

Date