

## 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 \$100; 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.

**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 \_\_\_\_\_