

## Client Information Sheet

All personal information is confidential and treated appropriately.

**Client Name** \_\_\_\_\_

Email Address \_\_\_\_\_

Phone \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Time Zone \_\_\_\_\_

Skype ID, if applicable \_\_\_\_\_

Age \_\_\_\_\_

Current Occupation \_\_\_\_\_

Reasons for engaging a Coach: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How did you hear about my coaching services? \_\_\_\_\_

Client Name: \_\_\_\_\_

### **About You!**

As a transformational life coach, it's important for me to understand how you view the world in general and yourself in particular. Each person has a unique way of thinking and being, and a unique way of interacting with those around him or her.

Please answer each of these questions as clearly and thoughtfully as possible. These are "pondering" questions intended to stimulate your inner inquiry in a way that clarifies how we can work best together.

I suggest that you take several days to compose your responses to these questions. Please scan or take a photo of your handwritten pages and return them to me (via email, if possible) at least a day before our first session together. Thank you!

**What accomplishments must, in your opinion, occur during your lifetime so that you will consider your life to have been satisfying and well lived – a life of few or no regrets?**

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**If there were a secret passion in your life, what would it be?**

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**What do you consider your role to be in your community (however you define that), in your country, in the world?**

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Client Name: \_\_\_\_\_

**What do you do for fun, for no other reason than that you enjoy it?** (If you are not currently doing anything fun [we need to talk about that!] what did you used to enjoy doing for fun?)

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**When do you, or when have you felt the most joy / satisfaction or fulfillment?**

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**If you could devote your life to serving others – and still have the money and lifestyle that you need – would you do it? What would it look like?**

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**Generally, what kind of coach do you think would work best for you? How can I best support you along your journey? (Do you need a cheerleader or “tough love?”... Do you need accountability or encouragement, or all of the above?** [This may change at any point in time. Always communicate how I can best support you])

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Client Name: \_\_\_\_\_

**If you trusted your coach enough to tell her how to work with you most effectively, what tips would you give?**

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**If you had a five-year goal and you had the continuing services of a coach to help you make that happen, what would that goal be? What difference would working with a coach make?**

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**What, if anything, do you feel is “missing” in your life? What would make your life more fulfilling?**

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**Do you believe in God (or in a higher power by some other name or word)? If so, how do you orient or wish to orient your life in relationship with Spirit? What word or words do you use to refer to this higher power? If you do not, what reference point do you use?**

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Client Name: \_\_\_\_\_

**As your Coach, is there anything else that you would like me to know about you?**

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Client Name: \_\_\_\_\_

### Coaching Agreement

This agreement, between Coach Tina Embree and the above-named client will begin on (*date of first scheduled session*): \_\_\_\_\_.

The fee per session is \$125 (or \$100 per session for 4 sessions scheduled within a calendar month). Each session is *approximately* 60 minutes long.

The following forms of payment are accepted – PayPal. A PayPal invoice will be emailed to client upon booking of coaching session. Payment should be made ideally before each session, or soon afterward (and before the next scheduled session) unless other arrangements have been made.

The services to be provided by the coach to the client are transformational life coaching, to include phone and/or video coaching, as designed jointly with the client.

Client understands that coaching is not therapy, counseling, or professional, health, or legal advice. Client understands that coach does not provide medical or mental health services, or the treatment of any disorders.

Coaching may address specific personal projects, business success, or general conditions in the client's life or profession. Other coaching services may include value clarification, brainstorming, identifying plans of action, examining modes of operating in life, asking clarifying questions, and making empowering requests.

Coach and client go into this contract at will, session by session, and client agrees to give coach a written or verbal communication when client feels that the coaching is complete. As part of client and coach's mutual commitment to the coaching relationship, client agrees to keep scheduled appointment times, except under exceptional circumstances.

Throughout the working relationship the coach will engage in direct and personal conversations with the client. The client can count on the coach to be honest and straightforward in asking questions and making requests and to keep personal information confidential. The client understands that the power of the coaching relationship can only be granted by the client – and the client agrees to do just that – have the coaching relationship be powerful. If the client believes the coaching is not working as desired, the client will communicate and take action to return the power to the coaching relationship, or end the coaching relationship.

Client and coach signatures on this agreement indicate full understanding of and agreement with the information outlined above.

\_\_\_\_\_  
Client

\_\_\_\_\_  
Date

\_\_\_\_\_  
Coach

\_\_\_\_\_  
Date