

INTAKE FORM

PERSONAL:

Date: _____

Full Name: _____

Address: _____

Phone #: Home (_____) _____ Cell: (_____) _____

Email Address: _____

Gender: Male Female Birth date: _____ Age: _____

Height: _____ Approx. Weight: _____

Marital Status: Married Single Divorced Widowed

Name of Spouse, Parent, or Guardian: _____

EMERGENCY CONTACT INFORMATION:

Name: _____ Phone: _____

Address: _____

Relationship: _____

Please Sign and Return: You are welcome to fill out as much or as little of the following information as you like, though more information can be more helpful to assist you in achieving your goals.

GOALS:

Please describe in as much detail as possible what your main goals are in working together, in order of importance. Please be as specific as possible and include any blocks or trauma you feel you may be having whether they be business, relationship, health, emotional or other. Use additional paper if needed.

A practitioner may want to extend this section and ask more detailed questions relating to the client's background, past successes and challenges, health and/or financial history, career, priorities, expectations etc. tailored to the specific needs of the treatment protocol.

The terms of our working together shall be as follows:

I. Appointments and Assignment

This section is optional but may be included to describe the specifics of working together. It is best used if there is a certain set time period to work together (say one a week for 6 months) or if there are details to the relationships. Such things may include, a) in person versus phone consultations, b) email support or no and if so under what terms, c) homework for the client and the expectations associated with it, d) monthly retainers and/or e) and special payment arrangements (for example, payment being a percentage of a project instead of a set rate etc.).

In the context of a more formal coaching or other arrangement, the following sections may also want to be included.

II. Confidentiality

The techniques, tools, processes written materials, homework and all other things, concepts and/or ideas I use with my coaching clients and otherwise (“Confidential Information”) are based on my many years of experience and are individually tailored to meet your specific needs. They are proprietary and strictly confidential and though I certainly want you to utilize them to the fullest in the context of our coaching relationship, you are not permitted to share, use or distribute them in any way without my express written permission.

III. Miscellaneous

- a. This document shall be interpreted pursuant to the laws of the State of _____ and _____ shall have exclusive jurisdiction and venue for any and all issues between the parties.
- b. You have right to enter this coaching relationship and do so in abidance with all laws, rules and regulations.
- c. This agreement may not be assigned or transferred without the express written consent of the other party.
- d. Each party agrees that unauthorized disclosure of the Confidential Information may irreparably damage the other party. Such damages cannot be fully compensated by money damages. Therefore, each party agrees that relief for such disclosure may be sought in equity, for which no bond will be required.

I have read, understand and fully agree to the above information:

Name (please print neatly): _____

Signature: _____ Date: _____

Parent or Guardian Signature (if under 18): _____