



Invest in Yourself & Shape Your World

Greg Gino DiTeodoro  
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267 254-3463

## CLIENT INTAKE PACKET

Welcome to Your Journey of Transformation!

I am delighted to welcome you as a client. Our coaching relationship is designed to be a co-creative process, focusing on achieving the outcomes you desire. To ensure a strong start, it's important to establish a clear understanding of our work together.

What to Expect from Our Coaching Partnership

**Co-Creative Process:** In each session, we will set an agreement based on your goals and what you wish to work on. You bring your aspirations, and together we will navigate the path to achieve them.

**Professional Partnership:** Coaching is a collaborative effort where we clarify the areas you wish to improve and work towards your desired outcomes. While coaching can help solve problems, its primary focus is on developing your skill sets, empowering you, and evoking your inner wisdom.

**Distinct from Consulting and Therapy:** Unlike consulting, where advice is given, coaching helps you discover your own answers. It differs from therapy as we will address obstacles preventing you from reaching your goals without engaging in psychological practices requiring licensure.

Getting Started

1. **Client Information Form:** Please fill out the enclosed form to provide essential details.
2. **Client Agreement:** Carefully read, complete all pertinent sections, sign, and date the enclosed agreement.
3. **Payment and Scheduling:** Handle the payment and reach out to book your first session.

Communication and Support

If you have any questions or concerns at any time during our coaching engagement, please do not hesitate to reach out. I am here to support you every step of the way.

I look forward to helping you create the life you envision.

Warm regards,  
Greg Gino DiTeodoro  
Certified Life Coach



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## CLIENT INFORMATION FORM

Full Name:

Birthday:

Occupation:

Your Time Zone:

Full Address

Cell Phone:

Phone (Other):

E-mail:

Significant Other's Name:

Children's Names/Ages:

Pet's Names/Ages:

Referred By:

Have you experienced Coaching, Counselling, or Therapy before? If so, describe:

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Are there any medical conditions or life circumstances that might impact the work we're doing in Coaching: If yes, please describe:

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What is your preferred method of learning? Please check all that apply:

☐ Visual (spatial, images)      ☐ Auditory (sound)      ☐ Verbal (use words)  
☐ Kinesthetic (physical, use body & touch)      ☐ Logical (use logic, reasoning, systems)



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## COACHING AGREEMENT

The Coaching Engagement: Our coaching engagement can be customized to meet your individual needs. Our sessions will be held by Phone, Skype, FaceTime, WhatsApp, or Facebook Messenger Video. At the time of our appointment, please call me on (267) 254-3463, using any of these methods.

### Fees & Payment Policies:

- Various Package Options & Rates are offered. Please scroll down to view them. Some people prefer to have weekly sessions, while others do bi-weekly. Also, the length of the coaching engagement can be 1 month, 3 months, or 6 months and beyond. Longer coaching engagements will show lower rates/session (more savings).
- You'll notice on the Package Options & Rates that if payment is made in full and upfront on any of the package options, there will be an additional discount.
- The following payment methods are accepted: PayPal, Venmo and Zelle. Payments must be made in U.S. funds at the beginning of each month (or at the same time each month, depending on when your coaching engagement begins). PayPal email is [greggino247@gmail.com](mailto:greggino247@gmail.com). Venmo handle is [@Greg-DiTeodoro](#) (if asked on VENMO for last 4 digits of phone number, enter 3463). For Zelle payments use mobile number 267 254-3464 or email [gditeodoro@aol.com](mailto:gditeodoro@aol.com).
- Sessions not used within your coaching engagement will be forfeited, and no refund will be provided.
- From time-to-time fees may change. When this happens, you will receive a minimum of 30days notice via email.

### -ONGOING COACHING:

- Unless written notice is received at least 3 days prior to the end of the coaching engagement, the initial coaching engagement will become an ongoing coaching engagement, and the investment will remain the same as above for an additional engagement.
- If ongoing coaching is not renewed, individual sessions may be purchased at any time for \$150 each.
- Sessions must be used for the months they are purchased. They may not be saved.

Keeping Appointments: Coaching is a commitment. I encourage you to keep your regularly scheduled appointments, as the results of our work together are cumulative. The best results usually happen because of your consistency and follow-through. Even if you feel unprepared, there is value to be gained by showing up. If you are late for an appointment, the agreed-upon schedule will still apply, and the session will end at the scheduled time.



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## COACHING AGREEMENT – CONTINUED

Missed Appointment: I understand that emergencies can happen to anyone; therefore, if an emergency keeps you from attending a session, please contact me whenever possible to let me know of the circumstances.

The Coach's Responsibility: I am committed to supporting you in achieving your desired outcomes and having each session be meaningful and productive. I agree to conduct myself professionally and maintain the ethics and standards set by the International Coach Federation.  
<http://coachfederation.org/about/ethics.aspx?ItemNumber=4045>

I will not offer advice in any area in which I am not qualified and will, upon request, assist you in finding a trained or licensed professional for any matter that is outside my scope of expertise.

Confidentiality: Your identity as a coaching client and all communications between us will be held as strictly confidential, to the extent permitted by law, unless you give me express permission to disclose specific information. While the coach-client relationship is not privileged and I may be required to disclose confidential information in a legal proceeding, it is highly unlikely that this will occur. If there is evidence that you are a potential danger to yourself or another, or that you disclose illegal activity, I am ethically bound to report it to the appropriate authority. In such a case, I will discuss it with you before taking such action.

Release of Information: As a professional coach, I engage in training and continuing education to pursue and/or maintain credentials with the International Coach Federation. That process requires that I provide the names and contact information of clients for possible verification by the ICF. By initialing this portion of the agreement, you agree (or refuse) to have only your name, contact information and start and end dates of coaching shared with ICF staff members and/or other parties involved in this process, for the sole purpose of verifying the coaching relationship. No personal notes or other information will be shared.

Client agrees \_\_\_\_\_ Client refuses \_\_\_\_\_



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## COACHING AGREEMENT – CONTINUED

Open Communication: I agree to communicate openly and honestly and to gently and compassionately share my observations as we work together. I encourage you to be open and honest with me, as we will get the best results from coaching if you share the full picture with me.

Communication Between Sessions: Please feel free to email, text or leave messages on my voicemail. I will get back to you as soon as I possibly can. I am happy to support you briefly (10 minutes or less) over the phone when I am free of other commitments.

Copyright: During the coaching process, I may assign you materials that are copyrighted by Fern Gorin and The Life Purpose Institute. Please note that these are for your use only and may not be shared in any form, printed or electronic, with any third party. If you wish to arrange for their use, please contact the Life Purpose Institute by email at [support@lifepurposeinstitute.com](mailto:support@lifepurposeinstitute.com) or call 858-484-3400.

Termination: Because a good termination process is important to your personal growth, please give me at least one session notice. This will give us the opportunity to review your concerns, discuss further steps you can take, and say goodbye in a meaningful and complete way.

The Client's Responsibility: I, as the client, understand that I am personally responsible for keeping the agreements stated in this document, as well as for any actions I take or do not take. As such, I do not and will not hold Greg Gino DiTeodoro liable for the consequences of my actions or absence of my actions. Additionally, I will take responsibility for creating value and results for myself, to ask for what I want in each session, and to give feedback about what works or doesn't work for me.

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Client -Signature

Date

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Client- Print Name

# BALANCED VISION LIFE COACHING

## PACKAGE OPTIONS &

		Sessions	Time	Price	
A LA CARTE		Complimentary	30 minutes	Free	
		Regular coaching session	60 minutes	\$125	
		Discovery session	75-90 minutes	\$150	
	Package	Sessions	Time	Price	Price if Pay Upfront
WEEKLY SESSIONS	One month- LEARN	4 sessions	4.5 hours	\$510- save \$35	\$500
	Reinvent your life in 30 days	Discovery session	90 minutes	\$130	
		Regular coaching session	60 minutes	\$120	
		Regular coaching session	60 minutes	\$120	
		Regular coaching session	60 minutes	\$120	
	Package	Sessions	Time	Price	Price if Pay Upfront
BIWEEKLY SESSIONS	Three months- GROW	6 sessions	6.5 hours	\$705- save \$70	\$690
		Discovery session	90 minutes	\$130	
		Regular coaching session	60 minutes	\$115	
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