



We Welcome You!

Welcome. I'm excited to partner with you as you work toward your vision and goals in life and work.

How we'll begin

We'll confirm the number and length of sessions during your discovery call. Between sessions, you're welcome to email brief updates, wins, or quick questions.

Getting started

Please review the enclosed materials. Once I receive your **Coaching Agreement** and **Client Information Form**, I'll reach out to schedule your first session. Please return the remaining forms before that session.

Please email the following to [your email address]:

- Coaching Agreement (signed online on my website)
- Client Information Form
- Client History
- Coaching Call Agenda

Optional resources

You'll be able to view my **Code of Ethics** and a short **State of Your Life** assessment to help identify focus areas. I also have additional worksheets and tools available on request. I'll tailor our approach to your learning and coaching style.

If you have questions before we meet, feel free to call or email.

Thank you for the privilege of serving as your coach.

Warmly,

Tracye Morris

MSW, LSW • Certified Life Coach

p: (317) 341-1534

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Coaching Client Information Form

I am delighted to be your coach. I look forward to being your partner as you identify and move towards your vision. You really can have, be, and do exactly what you want, and we will put a structure in place to make it happen. Welcome to my practice!

Please take some time to enjoy the reflection process that follows. Enter your responses into this form, then attach it to an email and send it to me at tracye@psalm119-105coaching.com.

About You

| | | | |
|-------------------------------|--|-------------------------------|--|
| First Name | | Last Name | |
| Address | | City | |
| State/Province | | Postal Code | |
| Country | | Company | |
| Title | | Home Phone | |
| Work Phone | | Work Extension | |
| Mobile Phone | | | |
| Email | | 2nd Email | |
| Occupation | | Who Referred You? | |
| Birthday | | Married? | |
| Religious affiliation, if any | | Spouse/significant other name | |
| Anniversary, if any | | Children? Names and ages | |

What are the two biggest changes you want to make in your life in the next three months?

What are the three biggest changes you want to make in your life over the next three years?

What do you most want to achieve during our initial coaching period? What most threatens to hold you back from achieving this desire?



Coaching Client History

As your coach, it is helpful for me to find out more about you so that I can better support, encourage and challenge you as you move towards your ideal life. Please review and answer these questions and return them to me at your earliest opportunity.

Thank you.

- 1. What have been your three most fulfilling accomplishments in life, thus far?**
- 2. What was the biggest obstacle you have had to overcome?**
- 3. How strong/powerful/healthy have your past personal or business role models been?**
- 4. How have you failed, and how has that affected the way you think and act today?**
- 5. Have you worked with a coach before? What worked? What did not work?**
- 6. What has made you the most successful or powerful?**
- 7. How would those closest to you describe your greatest strength?**
- 8. Do you have any mental health challenges that have affected you? Tell me about that.**
- 9. What should I know about your professional background or history?**
- 10. What should I know about your personal background or family history?**

Coaching Call Prep Form

Please email your responses to me at [coach's email address] at least 1-12 hours before each scheduled session. Taking just a few minutes to answer these questions before each session will help you organize and focus your coaching time to get the most out of our time together.

My Name:

My phone number:

My email address:

**Coach, I will call you for our coaching session on the following scheduled date/time:
Date/Time/Time Zone:**

This week, I'm most grateful for:

The "win" I most want to acknowledge this week is:

The actions I committed to from my previous session were:

My progress and results on those actions are:

What I learned since last session:

In order of priority, during this coaching session from you I want:

- 1.
- 2.
- 3.

You should know today that:

The opportunities I am facing:

The challenges I am facing:

The one question I hope you won't ask me:

Actions I am procrastinating about: