



Personal Information Sheet

Client Information

Name:	
Name you like to be called:	
Mailing Address:	
City, State, Zip:	
Street Address:	
City, State, Zip:	
Home Telephone:	
Work Telephone:	
Message or Cell Telephone:	
Other Telephone:	
Private/Personal Fax Number:	
E-Mail Address:	
Web Address:	

Employment Information

Occupation:	
Employer Name:	
Employer Address:	

Personal Information

Birthday (month and day):				
Preferred Pronoun:				
Marital Status:				
Significant Other's Name:				
S.O. Birthday (month and day):				
Names of children:				
Birth dates of children:				
Other information:				

Client-Coach Agreement

Coachee Name: _____

1. This agreement between the coach and the above named coachee will begin on _____ and will continue for a minimum of _____ months.
2. The fees for this time period are:
 - a. One time fee of _____ payable at the time of the Discovery session.
 - b. The monthly fee of _____ payable on the 1st of every month.

Note: The first month's fee is payable at the time of the Discovery session.
3. The service provided to the coachee is coaching, as designed jointly with the Coach/Coachee. Coaching is not psychotherapy. Coaching is an interactive process that helps individuals and organizations achieve their goals more quickly as a result of the coaching partnership. Coachees partner with their coach to create positive change in their careers, life transitions, small businesses, executive leadership roles and personal and professional relationships. Working with a coach allows coachees to set goals, take action, make informed choices, receive support and gain accountability to sustain results.
4. The time agreement is
An initial Discovery session of _____ (time)
_____ (#) sessions each month of _____ (time)
5. If, at any time when the Coachee and Coach choose to discontinue further services, Coachee and Coach will endeavor to provide one another with a 1-month notice.
6. While it is the intention of the Coach to maintain the confidential nature of the Coach/Coachee relationship, the Coachee acknowledges that the law does not recognize that relationship for legal purposes, and that information shared with the Coach may be divulged in a court of law.
7. One of the main purposes of coaching is to focus the Coachee on positive change and to coach the coachee to realize those changes. The coachee can count on the Coach to be honest and straightforward.

8. To begin our coaching relationship, the Coachee is asked to initial the following requests:

_____ a. Please make all appointments/calls on time. If you must be late, please call ahead of time.

_____ b. If you must change an appointment, please give me 24-hour notice. If less than a 24-hour notice is given, a makeup appointment will only be scheduled if feasible with my week's schedule. If you miss a scheduled appointment without giving 24-hour notice, you will be charged for it.

_____ c. As your coach, it is helpful to be aware of past and present events, addictions, conditions, medications, and/or ways of thinking that may influence your life now (e.g. Are you in a 12-step program? Are you in therapy? Do you have a learning disability?). Please use the space below to list pertinent information:

_____ d. You give full permission for openness and honesty in coaching you.

_____ e. Having coaching work for you is a shared responsibility. That means that your Coach holds and expands the options and possibilities while you do the work. Your work includes leading the session, asking for what you want, and letting your Coach know what is working and not working in the coaching relationship.

_____ f. Your Coach will acknowledge you publicly as a Coachee only with written permission.

_____ g. Your Coach will use you as a reference only with written permission.

_____ h. Your Coach will quote you and/or use your name in promotional literature only with written permission.

Our signatures on this agreement indicate full compliance with the requests and promises above, and complete understanding of the services to be provided.

Date _____

Coachee

Date

Certified Mindful Change Coach

Confidentiality Statement

Confidentiality, or speaking "in confidence," means that everything a client tells his/her coach is secret and private from any person, group or organization. Information that is confidential includes all written notes in the client's file, all mental notes in the coach's head, and even the client's status as a client. There are exceptions, however, and I may have to break confidentiality if any of the following situations arise:

- (a) Suicidal Action If it is clear to me that you are ready in the immediate future to commit an actual suicidal act, I will consider it my responsibility to intervene. Action will be taken only if you are clearly ready to attempt suicide. In an extreme case, I may inform police and/or emergency paramedics who will arrive and intervene. Such a call would not be a surprise to you. I would tell you of my concern and potential action, unless you gave me no alternative. Also, if you talk about suicidal thoughts, dreams, wishes or urges I will offer appropriate referrals to you so that you can speak with a trained counselor/ therapist.
- (b) Danger to Others If it is clear to me that you have an intention to harm someone, or you have a plan on how to harm someone, and that person has been named or identified, I will consider it my responsibility to notify the police and take reasonable steps to warn the intended victim.
- (c) Unable to Care for Yourself If it is clear to me that you are unable to take basic care of yourself and your safety, then I will consider it my responsibility to alert paramedics and/or police that you are "gravely disabled." A client is considered "gravely disabled" if, for example, they cannot feed themselves, might walk into traffic; don't know where they are or how to get home, and similar major problems in basic functioning.
- (d) Child. Dependent Adult or Elder Abuse If during your coaching you mention that you abused a child or physically abused an elder or dependent adult, I will consider it my responsibility to make a report with Child or Adult Protective Services.
- (e) Court of Law The legal system does not recognize the Coach/Client relationship as confidential. Information shared with me, as your coach, may be subpoenaed and required as testimony in a court of law.
- (f) As a coach, I work with adults 18 years old and older. If you are a minor, your parents or guardians will be informed of your progress, if they ask. However, we do not discuss details of our coaching conversations.

Please understand that these situations rarely happen and the "breaking of confidentiality" occurs only in extreme and urgent situations. Other than the above and other exceptions mandated by law, all communications with me will be protected and held in complete confidence.

Client _____ Date _____ Coach _____ Date _____