

# New Client Paperwork

Clients Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Age: \_\_\_\_\_ Insurance Company: \_\_\_\_\_ ID#: \_\_\_\_\_ Policy

Holder's Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Married \_\_\_ Divorced

\_\_\_ Single \_\_\_ Remarried \_\_\_ Other \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

\_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work/Home

Phone: \_\_\_\_\_ Employer: \_\_\_\_\_

\_\_\_\_\_ Position: \_\_\_\_\_

\_\_\_\_\_ Referred By: \_\_\_\_\_

\_\_\_ Previous Counseling: \_\_\_ No \_\_\_ Yes Clinician's Name: \_\_\_\_\_

\_\_\_\_\_ Issues Addressed: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

\_\_\_\_\_ Spouse's Address: \_\_\_\_\_

\_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Children (Names and Ages): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

FOR MINOR CLIENTS: Parent/Guardian Name: \_\_\_\_\_

\_\_\_\_\_ Mother's Information: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Father's information: Address: \_\_\_\_\_

\_\_\_\_\_ City, State, \_\_\_\_\_

Zip: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

\_\_\_\_\_ Work Phone: \_\_\_\_\_

Contact in case of Emergency: Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home/Work Phone: \_\_\_\_\_ Patient Communication Preferences: I will need to contact you to schedule and/or reschedule appointments, to schedule follow-up visits and other such administrative issues. To ensure that your privacy is maintained to the fullest extent possible, please select the method by which our office can contact you.

Cell Phone Calls & Text: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Leave Message? \_\_\_ Yes \_\_\_ No Leave Message? \_\_\_ Yes \_\_\_ No Personal email: \_\_\_\_\_

\_\_\_\_\_ Work phone: \_\_\_\_\_ Leave Message?  
\_\_\_ Yes \_\_\_ No

**Quick: Getting to Know You**

Please take as much space as you need to answer as many of the following questions as you wish to answer:

Please write a brief life story, giving whatever background you wish.

Why do you want coaching? What specific issues would you like to work on?

What are the major things happening in your life right now?

How would you like your life to be different one year from now?

What is getting in the way of these changes or goals?

What are your insecurities about being coached?