

# Client Intake Form Client

## Intake Form

New Phase Consulting is happy to welcome you as a new client. We are excited that you chose us to help you achieve your personal goals. Please complete the following information and return it via email or mail so that we can get started.

Date: \_\_\_\_\_

## Individual Client

Name \_\_\_\_\_

## Corporate Client

Company Name \_\_\_\_\_

Title \_\_\_\_\_

## Contact Information

Address \_\_\_\_\_

City \_\_\_\_\_

State/Prov. \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Work/Type of Business \_\_\_\_\_

Number of Years Employed/ In Business \_\_\_\_\_

Business Phone (include area code) \_\_\_\_\_

Home Phone (include area code) \_\_\_\_\_

Work Email \_\_\_\_\_

Home Email \_\_\_\_\_

Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Spouse/Partner's Name (if applicable) \_\_\_\_\_

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Children's Names/Ages (if applicable) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Session Day/Time/Frequency \_\_\_\_\_

Start Date: \_\_\_\_\_

### **Preferred Payment**

Monthly Fee \_\_\_\_\_ Per Session \_\_\_\_\_

Venmo \_\_\_\_\_ Pay Pal \_\_\_\_\_

Credit/Debit \_\_\_\_\_

**Disclaimer:** The Client is aware that the coaching relationship does not represent psychological counseling or any kind of therapy. The Client is also aware that coaching results can vary and are not guaranteed. The Client agrees that he/she is entering into coaching with the understanding that the Client is responsible for his/her own decisions and results. The Client also agrees to hold the Coach free from all liability for any actions or results for adverse situations created as a direct or indirect result of advice given by the Coach. (Client initials)\_\_\_\_\_

**Session Contact Procedure:** The Client shall contact the Coach at the agreed hour. If the Client fails to make the appointment time, the Client is still responsible for the coaching fee, unless 24-hour notice was given to reschedule the appointment. The Coach will make every effort to reschedule with the client.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Coach Signature

\_\_\_\_\_  
Date

# Important Issues

Please briefly outline any issues you would like to deal with and what you hope to achieve in the coaching setting:

Issue #1

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Issue #2

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Issue #3

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Issue #4

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Issue #5

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## Personal Profile

Please answer the following to let us get to know you a bit better:

1. I would describe myself as:

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2. Others would describe me as:

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3. The three things that I like most about my life/situation are:

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4. If I could change three things about my life/situation, they would be:

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5. My three greatest accomplishments (so far) are:

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6. Some of my hobbies/interests are:

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7. The one thing I would like most to accomplish (but haven't yet) is:

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8. The one thing I wish I could change in the short-term is:

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9. I think that the most important thing in life is:

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10. I am interested in working with a life coach because:

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