**The Welcome Packet #1 Dr. Elizabeth-Anne Stewart, BCC, PCC** [**www.elizabeth-annestewart.com**](http://www.elizabeth-annestewart.com) **773-495-0228**

**CLIENT DATA SHEET: LIFE COACHING**

Please take the space you need to answer the following questions; the more details you provide, the clearer your goals and expectations will become! If possible, please attach a recent photograph when you return this package. Thank you.

**NAME:**

**HOME ADDRESS:**

**DAY PHONE: EVENING PHONE:**

**CELL PHONE:**

**EMAIL ADDRESS:**

**WEBSITE:**

**PREFERRED MEANS OF COMMUNICATION:**

**DATE OF BIRTH: AGE:**

**EMERGENCY CONTACT & PHONE NUMBER:**

**OCCUPATION:**

**PREFERRED COACHING SCHEDULE:** (please provide a number of options that work for you)

**Days of Week\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time of Day\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**HOW DID YOU LEARN ABOUT MY COACHING SERVICES?**

**\*\*\***

**FAITH TRADITION, IF ANY:**

**PRIMARY IMAGE OF YOURSELF:**

**CORE BELIEFS & SPIRITUAL PRACTICES:**

**CORE VALUES:**

**WHAT ARE YOUR MOST LIFE GIVING ACTIVITIES/RELATIONSHIPS?**

**WHAT ACTIVITIES/RELATIONSHIPS DRAIN YOU OF ENERGY?**

**HOW WOULD YOU DEFINE YOUR CALLING IN LIFE?**

**WHY ARE YOU SEEKING COACHING AT THIS TIME?**

**HAVE YOU EVER BEEN COACHED? IF SO, PLEASE DESCRIBE THE EXPERIENCE.**

**ARE YOU PRESENTLY WORKING WITH A LIFE COACH OR THERAPIST? IF SO, PLEASE PROVIDE DETAILS.**

**DO YOU HAVE SPECIFIC GOALS YOU WISH TO ADDRESS IN A COACHING RELATIONSHIP?**

**WHAT ASPECTS OF YOUR LIFE ARE WORKING BEST RIGHT NOW?**

**WHAT ASPECTS OF YOUR LIFE COULD BE WORKING BETTER?**

**WHAT STOPS YOU FROM HAVING THE LIFE YOU WANT TO HAVE?**

**\*\*\***

**YOUR LIFE STORY:**

**Feel free to present this as you wish** – as a “journal” narrative, in bullet points or even as a formal autobiography, if you so wish (not necessary). It may help to break down your story into the following sections, but these are just suggestions: 1) Description of early family life; 2) Personality traits, aptitudes and weaknesses;3) Patterns that have emerged in your life e.g. the pattern of neglecting yourself in the service of others or the pattern of forgoing opportunities because of fear; 4) Key people in your life; 5) Key places in your life; 6) Dreams you have followed; 7) Closed doors; 8) Your present reality; 9) Your dreams for the future.

**The Welcome Packet #2 Dr. Elizabeth-Anne Stewart** [**www.elizabeth-annestewart.com**](http://www.elizabeth-annestewart.com) **773-495-0228**

**LIFE COACHING AGREEMENT**

**Please review and sign this agreement**, mailing it with your check before each phone session, to: Dr. Elizabeth-Anne Stewart, 565 W. Quincy Street, Chicago, IL 60661. You can also pre-pay each phone session via Chase Quick Pay/ Zelle. *Thank you! Office Coaching sessions must be paid at the conclusion of each session. Please provide 24 hours’ notice before cancelling an appointment to avoid having to pay for your session!*

*If you decide to purchase a 6 hour package within a week after the first session, the discount will be applied retroactively. Coaching packages must be used within 6 months of purchase.*

**NAME:**

**INITIAL TERM: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**NUMBER OF SESSIONS PER MONTH:**

**FEE**: **$125.00** per session

OR **$690.00** for a pre-paid package of 6 sessions.

**METHOD OF PAYMENT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**FIRST SESSION DATE:**

**FIRST SESSION TIME:**

**LOCATION:** 30 N. Michigan Suite 1924, Chicago, IL 60602 **\_\_\_\_\_\_\_ or**

**ZOOM VIDEO CONFERENCE CALL \_\_\_\_\_\_\_\_** ( I will provide the links)

**LENGTH OF SESSION:**

**REFERRED BY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**AS CLIENT, I AGREE THAT:**

* I will pay fees on time
* I understand that I am responsible for full payment of any missed sessions or of sessions cancelled less than 24 hours before an appointment.
* I will arrive for my appointment or call the coach at the scheduled time
* I am fully responsible for my well being during coaching calls/visits, including choices and decisions that may emerge from the coaching process
* I am aware that coaching is neither psychotherapy nor a substitute for psychotherapy
* I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association
* I promise that if I am in therapy or under the care of a mental health professional, I will consult that person regarding the advisability of working with a life coach; I will also let my life coach know that I am working with another professional
* I understand that life coaching is not to be used *in lieu* of professional advice regarding financial, medical, legal and business issues or any other issues
* I understand that certain topics may be shared anonymously with other life coaching professionals for the purpose of training or consultation

I have read and agreed to the above.

**CLIENT SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PRINTED NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DATE:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The Welcome Packet #3 Dr. Elizabeth-Anne Stewart** [**www.elizabeth-annestewart.com**](http://www.elizabeth-annestewart.com) **773-495-0228**

**CLIENT POLICIES & PROCEDURES**

***Welcome!*** **Welcome to coaching as my client! I very much look forward to working with you, but need to let you know of the guidelines we will maintain for things to go smoothly. Please don’t hesitate to call if you have any questions.**

**FEE** Clients pay me on time, whether that means purchasing a package of sessions and paying for them before we begin working together or whether you “pay as you go.” I accept checks, cash and payments through Chase Bank (Quick Pay).

**PROCEDURE** My clients arrive on time/call on time. To get the most out of each session, please complete the enclosed Client Prep form before your appointment and email me a copy at least two days before our scheduled session. You will set the agenda and I will support you in your goals. Please note that I cannot do your work for you; it is your responsibility to implement the steps that emerge from the coaching experience or you will not meet your goals!

**CALLS** Our agreement includes a set amount of one hour calls or meetings. We will work around vacations, conflicts etc. but I must have 24 hrs’ notice if you wish to cancel or re-schedule a call or meeting. Barring any emergency, you are responsible for paying for missed appointments.

**EXTRA TIME** If you need a call or meeting to be longer than one hour in length, we can apply your “coaching time purchased” to a particular session, if my schedule permits. If you wish to contact me between sessions, the best way is by email. I am happy to provide a brief response to your questions, comments or updates.

**PROBLEMS** If you everhave concerns about my responses or suggestions, please let me know. Language is an imperfect tool and so it is possible to take offense over words taken the wrong way. Transparency and honesty will be essential if we are to work well together. If you are uncomfortable with my coaching style at any point in our work together, do let me know so that we can come up with a solution. It may be that I am not the right coach for you at this time in your life. If I believe that you would be better served by another coach or resource, I will encourage you to make a change and reimburse you for any future sessions that you have already paid for. Please note that if you disclose the intention to endanger yourself or others, I will take all reasonable steps to notify the appropriate authorities.

I will respect the confidentiality of your information, except as otherwise authorized by you, or as required by law.

**The Welcome Packet #4 Dr. Elizabeth-Anne Stewart** [**www.elizabeth-annestewart.com**](http://www.elizabeth-annestewart.com) **773-495-0228**

**CLIENT PREP SHEET: LIFE COACHING**

**Please answer the following questions in as much detail as possible, and then return the sheet to me at least two days before our next session. Thank you.**

1. What was the most helpful about our last session?
2. What challenges surfaced as a result of our time together?
3. What affirmation/encouragement did you receive?
4. What would you like to change about the format of the next session?
5. How can I, as coach, be more helpful?
6. What outcomes, if any, can you attribute to your last coaching session?
7. Were these outcomes what you were hoping for?
8. What “unfinished business” remains following the last session?
9. What got in the way of your accomplishing your goals?
10. What is your time frame for completing this unfinished business?
11. What would you like to focus on during our next session together? If there are several topics/goals, please place them in order of importance?
12. Is there anything else that I need to be aware of before our next session?