

**CLIENT INFORMATION**

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

**Referral Source:** \_\_\_\_\_

**Client Name:** \_\_\_\_\_

**Age:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **SEX:** \_\_\_\_\_

**Marital Status:** Single Married Separated Divorced Widowed (# years: \_\_\_\_\_)

**Emergency Contact:**  
\_\_\_\_\_

**Number of Children:** \_\_\_\_\_ **Ages:** \_\_\_\_\_ **How many live with you?** \_\_\_\_\_

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

**City:** \_\_\_\_\_

**County:** \_\_\_\_\_

**State:** \_\_\_\_\_

**Zip Code:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Webpage:www.** \_\_\_\_\_

**Home Phone:** \_\_\_\_\_ **Cell Phone:** \_\_\_\_\_

**Workplace  
information:** \_\_\_\_\_

**May your Coach leave messages at all these numbers? Yes or No.**

**Please answer the following questions and attach a separate sheet if necessary:**

**How would you describe your relationship with the Lord Jesus Christ?**

\_\_\_\_\_  
\_\_\_\_\_

**What is your involvement in the Christian community? (church, life groups etc.)**

\_\_\_\_\_  
\_\_\_\_\_

**What are your most important long-term goals?**

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**What do you feel are the greatest obstacles to achieving your goals?**

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**What is your approximate projected time frame in which you would like to accomplish your goals?**

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**What is your calendar of available time for coaching (days/weeks/hours)?**

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**What would you like your Coach's specific role to be?**

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**What are your greatest strengths?**

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**What are your greatest weaknesses?**

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**What are your most significant personal accomplishments?**

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**What is your marital/relationship history?**

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**What is your educational level?**

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**What is your employment history?**

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**How would you describe the state of your health?**

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**What was the date and finding(s) of your last complete physical?**

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**Please list any other information that you would like your Coach to know:**

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#### **FINANCIAL RESPONSIBILITY INFORMATION**

It is the goal of Plumbago Cottage Ministries to provide Coaching at an affordable rate. Helping you achieve greater success is always your Coach's primary goal. Therefore, your Coach uses a sliding scale:

##### **Yearly HOUSEHOLD Income**

<b><u>Below \$20,000</u></b>	<b><u>Any amount</u></b>
<b><u>\$20,000 to \$29,000</u></b>	<b><u>\$20</u></b>
<b><u>\$30,000 to \$39,000</u></b>	<b><u>\$30</u></b>
<b><u>\$40,000 to \$49,000</u></b>	<b><u>\$40</u></b>
<b><u>\$50,000 to \$59,000</u></b>	<b><u>\$50</u></b>
<b><u>\$60,000 to \$69,000</u></b>	<b><u>\$60</u></b>
<b><u>\$70,000 to \$79,000</u></b>	<b><u>\$70</u></b>
<b><u>\$80,000 to \$89,000</u></b>	<b><u>\$80</u></b>
<b><u>\$90,000 to \$99,000</u></b>	<b><u>\$90</u></b>
<b><u>\$100,000 +</u></b>	<b><u>1/1000 of yearly household income</u></b>

A typical length per session with the Client is approximately 50 minutes. Your Coach customarily spends an additional 20 minutes preparing for the next session.

Coaching fees are based on the services provided. Your Coach will meet and have follow-up sessions with you until you feel that you have accomplished your personal goals. The fee structure is shown above with no retainer or long-term contract. Emails are always available between visits and will usually be answered within 72 hours. Emails requiring a longer response than 5 minutes will be billed in proportion to the hourly rate. Twenty-four hour notice is required for the cancellation of a coaching session or the client may be billed at the normal rate and may result in

**the termination of the Coaching Agreement at the discretion of the Coach. Returned checks will be subject to an additional fee of the hourly rate and future payments will be required through PayPal. Payment is expected within 24 hours of the session via PayPal or by personal check mailed to:**

**Patricia Silensky  
PLUMBAGO COTTAGE MINISTRIES INC.,  
732 N.E. Jordan Terrace, Port St. Lucie FL 34983-1272**

**MY PLEDGE AMOUNT:\_\_\_\_\_**

**INITIAL:\_\_\_\_\_**

### **HOW ARE SESSIONS CONDUCTED?**

**A typical session is done via telephone or Zoom. Clients having an iPhone may choose to use FaceTime. Some established clients who live locally may be seen in a public setting.**

### **COACHING AGREEMENT**

#### **COOPERATION**

**It is assumed that both parties will act in good faith and be in full cooperation with each other in regards to the agreed upon coaching objectives. Neither party will withhold important information which would benefit the coaching process, nor will either party act in any manner which would interfere with facilitation of the coaching goals, including non-compliance with the timely completion of any homework assigned by the Coach. The Coach reserves the right to terminate the Coaching Agreement if it is determined that the Coach/Client relationship is not a good fit for both the Coach and the Client.**

#### **CONFIDENTIALITY**

**Confidentiality and protection of intellectual property is mutually agreed to be protected by this contract of agreement. Both parties agree that all data, information, and work completed during the course of coaching will remain confidential. No information or materials will be shared with outside sources or other people regarding the work of either party, express with written permission of both parties.**

#### **TELECOACHING**

**Telecoaching includes getting coaching by Zoom (or Zoom-like programs,) email, or by telephone.**

**A. The laws that protect the confidentiality of my coaching information also apply to telecoaching. As such, I understand that the information disclosed by me during the course of my coaching is generally confidential. In Florida, Coaches are required by Florida law to make both mandatory and permissive exceptions to confidentiality; including, but not limited to, reporting child, elder, and dependent adult abuse; expressed threats of violence towards an ascertainable victim; and where I make my mental or emotional state an issue in a legal proceeding. *It is the legal duty of your Coach to report a threat of suicide or bodily injury to the Client or to another individual.* Also, my Coach may have to release information if required by a court.**

**B. I understand that all information disclosed during coaching is confidential, including the written notes that the Coach makes of my sessions. However, by law, there may be times when my Coach is required**

and/or permitted to break confidentiality. I also understand that I am expected to keep my communications confidential. I agree that all records of communication between Client and Coach remain the property of my Coach.

**C. I understand that there are risks and consequences from telecoaching, including but not limited to: the possibility, despite reasonable efforts on the part of my Coach, that the transmission of my coaching information could be disrupted or distorted by technical failures; the transmission of my coaching information could be interrupted by unauthorized persons; and/or the electronic storage of my coaching information could be accessed by unauthorized persons. It is my responsibility to determine who has access to my computer and electronic information. I understand that this may include, but is not limited to, family members, friends, and co-workers. I agree to communicate through a computer that I know is safe and I will fully exit the medium of communication after my session with the Coach. In addition, in the event of an interruption due to technological breakdown, I will try to reconnect within 10 minutes. If reconnection is not possible, another session time will be scheduled using the time remaining before the interruption occurred.**

**I hereby consent to engaging in telecoaching with Patricia Silensky. I understand that “telecoaching” includes the practice of coaching and education using interactive audio, video, or date communications. I understand that telecoaching also involves the communication at times of confidential information, both orally and visually.**

#### **MODIFICATIONS AND EVALUATIONS**

**Either party may request to modify this contract by mutual consent at any time it becomes apparent that modification is needed. The Coach agrees to advise and influence ideas and actions; however, the Client is always the final decision-maker in the coaching process.**

#### **EMERGENCY SITUATIONS**

**I understand that Plumbago Cottage Ministries is not an emergency facility. In case of emergency, I agree to seek counseling/professional help and/or go to the nearest hospital or emergency care or call 911.**

**Please feel free to discuss any questions you have with your Coach before signing this agreement. By your signature, you affirm that you have read and understood the entirety of the Coaching Agreement, and that you agree to abide by any and all of its stipulations/requirements.**

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

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

**Please send this intake form to your Coach by email or USPS mail before your first session.**

*C.2008, [www.DwightBain.com](http://www.DwightBain.com) & modified by [PatriciaSilensky@PlumbagoCottageMinistries.org](mailto:PatriciaSilensky@PlumbagoCottageMinistries.org).*