# CLARITY LIFE COACHING, LLC

# *Clear the path to your best life*

# Client Coaching Agreement, Intake Information, Questionnaire, and Supplemental Information

**Please complete pages 1-4 by enabling editing.**

Name

Address

Phone

Email

Occupation

Date of Birth

How did you learn about Clarity Life Coaching, LLC?

Friend (name)

Web or social media

Other

# Packages – Please Circle Your Choice:

# Dip Your Toes In or Single Session Fees: $60 per 60-minute session – payable in advance or at our session.

# Jump Start Package: 1 Month. 4 sessions @ $60.00 per 60-minute session - $240.00 payable in advance or at our session.

# Deeper Dive Package: 3 Months. 12 sessions @ $55.00 per 60-minute session - $660.00. One-half payable in advance or at our session. Balance due at week 6.

# New Horizons – New You Package: 6 Months. 24 sessions @ $50.00 per 60-minute session -$1200.00. One-half payable in advance or at our session. Balance due at week 12.

# I Understand and Agree:

1. As a client, I understand and agree that I am fully responsible for my physical, mental, and emotional well-being during my coaching sessions, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time.
2. I understand that coaching is a Professional-Client relationship I have with my coach that is designed to facilitate the creation/development of personal, professional, or business goals, and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education, and recreation. I acknowledge that deciding how to handle these issues, incorporate coaching into those areas, and implement my choices is exclusively my responsibility.
4. I understand that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in

place of any form of diagnosis, treatment, or therapy. If I am currently receiving psychiatric care, I will consult with my caregiver to ensure working with a coach is in my best interest at this time.

1. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law. I understand that if I reveal information that involves physically hurting myself or others, the coach must report such information and/or refer to mental health professionals accordingly.
2. I understand that certain topics may be anonymously and hypothetically shared with other coaching professionals or clients for training, educational, or consultation purposes, and that Marcia Taylor will take great care to change any identifiable details to protect my privacy.
3. I understand that coaching is not to be used as a substitute for professional advice by legal, medical, financial, business, or other qualified professionals. I will seek independent professional guidance for legal, medical, financial, business, or other matters. I understand that all decisions in these areas are mine, and I acknowledge that my decisions and my actions regarding them are my sole responsibility.
4. Because professional coaching is not considered medical consultation or treatment, health insurance does not apply.

# I have read and agree to the above.

Client Signature Date:

# Questionnaire:

# What are 3 goals you’d like to achieve within the next 3-6 months?

# What are the 3 biggest goals you’d like to achieve in the next 5 years?

# Tell me about the biggest life changes and challenges you’ve had to face in the last few years.

# What is most important in your life and why?

# Do you feel your life is of your choosing right now? If not, who is choosing it for you?

# On a scale of 1 – 10 how:

# \_\_\_ Happy are you with your life right now?

# \_\_\_ How motivated do you feel?

# \_\_\_ How stressed do you feel?

# List 5 things you feel you are ‘putting up with’ right now.

# How do you learn best? (reading, doing, talking, writing, etc)

# With 1 being not at all important, and 10 being very important, what would you like from your coach and our sessions?

# \_\_\_\_ Gaining clarity of issues I feel I am facing

# \_\_\_\_ Understanding what is important to me and what motivates me

# \_\_\_\_ Exploring and understanding what is holding me back

# \_\_\_\_ Gaining insight into who I am (personality, values, strengths, capabilities, potential)

# \_\_\_\_ Encouragement and support

# \_\_\_\_ Helping me define my goals

# \_\_\_\_ Helping me identify an action plan and next steps

# \_\_\_\_ Challenging me with difficult questions

# \_\_\_\_ Providing me with honest and direct feedback

# \_\_\_\_ Making me accountable for my goals

# \_\_\_\_ Relaxation and renewal

# \_\_\_\_ Helping me find more joy in my life

# How We Will Work Together

It’s an honor to be working with you. I look forward to our coaching relationship! I appreciate your confidence and look forward to assisting you as you gain the clarity needed to live your best life.

This is a co-creative relationship. I see us as equals and I encourage you to do the same. I am not a therapist, counselor, or consultant. I am a trained coach, using practiced communication and listening skills to support you as a detached thinking partner. Together we create more power for you to effect meaningful change and take dynamic actions towards your forward movement.

Please understand, that if you’re seeking to change something about yourself, it takes time. Most of my clients feel a positive shift as soon as the very first session.

Unfortunately, that typically doesn’t last as many of the thought and behavior patterns we develop are from as far back as childhood and are deeply rooted. Much like the time it might take to create a new path in a thickly wooded forest, the same is true for building new neural pathways in our brain. We will be working on new ways of reacting, responding, and perceiving your life. So, like the pushed aside branches that snap right back into place the first several times of forging a new path, you will likely revert to old ways of being and experiencing in the beginning. The good news is that with time and practice, you’ll begin to become aware of the elevated choices and options available to you in each moment. Over time, it’s amazing to see how your life and relationships begin to level-up and evolve. If you’re serious about change, decide to make a commitment to coaching.

**Your One-on One Coaching Experience & FAQs:**

Your coaching experience will be unlike anyone else’s because you are unique. Sometimes you just need to be heard by someone who is trained, compassionate, and completely objective. From these conversations much change can happen!

There are also many tests and exercises that help us uncover together who you are and how satisfied you are with life - this helps so much if you are confused and have no idea what you really want from life. Additionally, I am a Certified Mindfulness Meditation Coach, and offer guided meditation for increased mindfulness, or guided meditation to reinforce goals, positive feelings, re-frame fear, and more. We may use visualization exercises, brainstorming exercises, develop a personal mantra for you, or employ certain aspects of techniques like Anchoring, Neuro Linguistic Programming, or Cognitive Behavioral Therapy. I will offer feedback and ask a lot of questions. You share to your comfort level, and I only offer advice if asked for my opinion. My job is to help you discover what stands between you and achieving your goals and happiness.

What’s the difference between Life Coaching and Therapy? Life Coaching is focused on today and the future. Therapy deals with issues from your past and therapists and psychiatrists are educated and licensed to diagnose and treat personality disorders, mental illness, severe depression, etc. Life Coaches are certified and trained in the courses we take and bring our own life experiences, strengths, and successes to the table to help you gain clarity and set and achieve your goals. You and I collaborate. Yes, some of your roadblocks may be deep-seated in your past, and that is normal - we can use techniques to help you overcome them, but we are future-focused and not trained to diagnose and treat mental illness and clinical disorders. We do not dwell in the past. Why? The road to joy is in the present! Everyone is down or depressed from time-to-time – that’s Human too! How you handle these lows is what’s important, and coaching can help you clear the fog that is dragging you down and hit the re-set button.

**FAQs:**

Q: Can I be in therapy and utilize a Life Coach? Yes! The two work well together. Ask your therapist their thoughts on Life Coaching for you at the present time. Our sessions are completely private and confidential.

Q: Where do we meet? To ensure we will not be distracted so that you receive the attention you deserve, I practice out of my private, comfy, and relaxing she-shed on Heart Lake one mile north of Waters. My address is 9561 Old 27 South. I am one mile south of Mancelona/Old State Road, one mile north of the town of Waters, and one driveway north of Heart Lake Resort Cottages. Our sessions are one hour long. I want you to leave relaxed, focused, and energized – with a clear plan of what to do next.

Q: Will you come to me? Yes, if after your initial session you are unable to travel and feel you can provide a private location free from distraction, let me know and we will discuss the details.

Q: Does your space offer any amenities? Yes, I can offer you coffee, a variety of teas, and water. The space we will share is cozy and comfortable with a lovely water view which will allow you to relax and focus. I have a small lending library of books you may find interesting or helpful. You will receive your own journal to assist you in your journey when you enroll in a 1-, 3-, or 6-month program. You will receive a folder to keep your own file of any worksheets and papers.

Q: Can I purchase only one session? Yes, you can purchase only one session to see if it is right for you. The cost of this session will be applied to your purchase of a package if you chose to continue your journey. 3- and 6-month packages offer you a discounted hourly rate.

**Depending on your situation, the following are typical choices people make:**

* Weekly sessions for 3-6 months (recommended for those who have a feeling of being stuck and/or unfulfilled personally or professionally and are committed to forward movement. If you’re seriously struggling with a major life/work/emotional situation, 6 months is the best option)
* Sessions every week for 1 month (recommended for those who have a clear goal in mind and just need a jump-start to get moving on that targeted change.)
* Monthly sessions (recommended for those looking to continue the work they have started during the more frequent series of sessions.)
* A session every few months (recommended for those looking to touch base, connect, and maintain their momentum by continuing to challenge themselves.)
* One session to learn more about what life coaching can do for you. Relaxing guided meditation and personality self - analysis. Take a pause to find out if you'd like to continue the journey to clear the path to a better life.

# Your Role:

* Make our coaching sessions a priority. You have chosen to invest in yourself. Please take time before each session to complete any ‘homework’ or action items you have agreed to and be prepared to discuss progress and/or pitfalls you encountered.
* The most crucial part is for you have an idea of what you’d like to take away from the session. Coaching is strongly based on the client’s agenda. As we move through this process together, you will gain clarity on what your goals are.
* Please arrive to every session on time.
* Come to your session centered and be open-minded. Be willing to change your beliefs and patterns if they do not serve you anymore.
* Give me feedback in the moment on your coaching experience –what works as well as what doesn’t. Do not ever worry about hurting my feelings or fear what I might think. I am here to support you, not judge you, or make decisions for you. If something I say does not resonate with you, I want to know about it.

# My Role:

* I will listen closely to you, respond to what I hear, and ask questions. If I hear something in your voice or body language that sparks an idea, thought, or image, I’m likely to share it and ask you questions about it. Often, it is these small nuances that create the bigger shifts for clients. Remember, if it doesn’t resonate, tell me. I’m not attached to being right.
* At the end of the session, if you do not mention what actions you are ready to take, I will make a coach request. I ask clients to stretch themselves, deepen the work done in the sessions by either journaling at home, taking a defined action, resolving relationships, or tackling things that feel incomplete. You are free to negotiate, accept, or decline. Most of the work will be regarding self- awareness and powerful choice.

# Extra Time:

* Between sessions, if you have questions, a brief update, or want to bounce some ideas around, please contact me by email. Please keep these contacts succinct. If it seems like it will be better served as session material, I’ll suggest that.

# Fees:

* I accept cash and checks made out to Clarity Life Coaching, LLC, or you can pay through my website when you schedule, www.claritylifecoaching.org. I can send you a QR code for payment as well. My fees may be tax deductible as a business expense. Please check with your CPA.

# Schedule Changes:

* Please give our session high priority and arrange your schedule to honor our agreed upon time. If you must reschedule, I ask you to give me 24 hours’ notice if possible. I will not reschedule no-shows. Because I am holding an appointment for you and will be unable to fit another client in with less than 24 hours’ notice, a $60 session fee will be charged for sessions canceled at the last minute. Emergencies are an exception.