

Retirement Coaching Intake Form

About You:

Name: _____

Address: _____

City, State ZIP: _____

Phone: Day _____

E-mail address: _____

Marital Status: Married Divorced Widowed Single Other

Number of children and ages: _____

Number of grand children: _____

Professional History

Current or former position / title: _____

Employer: _____

Duration: _____

Education

Highest level of education achieved: _____

School / University / Institution: _____

City / State: _____

What are the primary reasons you are entering into a coaching experience at this time?

NOTE: Our coaching relationship is confidential. Unless you disclose issues that your coach is required to disclose to the authorities (e.g., intent to harm yourself or others), all of the content of our conversations will be held in confidence.

Is this confidentiality policy acceptable to you? Y/N

Where You Are Now

How would you rank your current level of satisfaction with each of the following areas of your life?

Life Area	Very Satisfied	Satisfied	Dissatisfied
Work			
Emotional health			
Physical health/well-being			
Mental / Cognitive health			
Finances			
Spirituality/religion			
Relationship with spouse/significant other			
Relationship with children			
Relationships with boss or coworkers			
Social network/friendships			

What are your most important goals for the next 6 months?

1. _____
2. _____
3. _____

What are the primary issues you would like to focus on during our coaching – or outcomes you would like to experience?

1. _____
2. _____
3. _____

What are you like when you are at your best?

How would you like me to be as your coach, so that I best support you? (e.g., demanding, gentle, challenging, etc.)

What else would you like your coach to know about you and your current life situation?