

General Client Intake Packet

Welcome to Olive Branch

We are honored that you have chosen to begin your journey toward growth, clarity, and empowerment with us. Our goal is to provide a safe, faith-forward environment that supports you through life transitions, healing, and personal development. This general intake helps us understand your needs so we can identify the best coaching program or support area for you.

Client Information

Full Name:	_____	Date of Birth:	_____
Address:	_____ _____		
City, State, ZIP:	_____	Phone:	_____
Email:	_____	Preferred Contact:	☐ Phone ☐ Email ☐ Text
Emergency Contact:	_____	Phone:	_____

Coaching Purpose & Goals

What brings you to Olive Branch today?

What are your main goals or areas of focus?

What does success look like to you?

Areas of Interest (check all that apply)

- ☐ Christian Life Coaching
- ☐ Faith-Based Recovery Coaching
- ☐ Family Court / Organizational Coaching
- ☐ Legal Advocacy / Pro Se Education Coaching
- ☐ Housing Stability Coaching
- ☐ Health & Wellness Coaching
- ☐ Mental Well-Being Coaching

- Business / Executive Coaching
- Medical Navigation Coaching
- General / Intensive Strategy Coaching
- Prenuptial Planning Prep Coaching
- Other: _____

Current Situation

Briefly describe any current challenges or transitions you are navigating:

Have you worked with a coach or counselor before? ■ Yes ■ No

If yes, briefly describe your experience: _____

Confidentiality & Boundaries

Your privacy and trust are sacred to us. Everything discussed during your coaching sessions will remain confidential, with the exception of situations where disclosure is legally or ethically required (such as imminent harm or abuse). Olive Branch is a professional environment where respect, honesty, and integrity are upheld.

Consent to Coaching

I understand that coaching is not therapy, mental health treatment, or legal representation. Coaching focuses on goal setting, accountability, education, and personal growth. I agree to participate actively and to take responsibility for my progress and results.

Client Signature: _____

Date: _____

Coach Signature: _____

Date: _____

Additional Notes (Optional)
