

Personal Information Sheet

All personal information is confidential and is treated appropriately.

Client Information

Full Name: _____

Preferred Name: _____

Mailing Address: _____

Street Address (if different): _____

Email Address: _____

Telephone Numbers

Home: _____

Work: _____

Cell / Pager / Message: _____

Fax: _____

Best time / place to reach you: _____

Employment Information

Occupation: _____

Employer Name: _____

Employer Address: _____

Personal Information

Birthdate: _____ Marital Status: _____

Significant Other's Name: _____

Number of Children: _____ Names / ages of Children: _____

Name, Address, Phone Number of nearest relative or friend not living with you:

Client Questionnaire

The following questions will help us design our coaching alliance together. Their intention is twofold: 1. To stimulate thought and provoke inquiry into your life, and 2. To help me get a sense of how you view yourself and the world. There are no right or wrong answers.

1. In looking back at your life, what (if anything) would you have needed to do / to see / to experience in order to consider your life one of fulfillment?
2. Take time to describe your passions or joys - - what are they?
3. What's missing in your life, the presence of which would have your life feel more fulfilling and satisfying?
4. What are your spiritual or religious beliefs?
5. Describe any significant child care, elder care or family responsibilities you have.
6. What else would you like me, as your coach, to know about you?

Values Clarification

Values represent who you are and what you hold to be important in your life. They are not societal standards of good and evil, nor are they things that come and go. Your values are a core part of you.

During our work together, we will often look at your values. In the beginning of our work together it is often useful to clarify your top values. The following questions are intended to increase awareness for both of us around your values.

1. Think of a peak time in your life, a time of extreme pleasure or adventure, learning or satisfaction, peace or well being. Describe this time, with as many pertinent details as possible.
2. Think back to a terrible event or moment / period of time in your life, a time where you felt dishonored, unloved, disempowered. Describe this time, with as many pertinent details as possible.

Coaching Goals

We'll be using your goals to help steer our coaching work and focus areas. These goals may be business and/or personal in nature. A goal is a specific measurable result (e.g. achieve promotion by June 1 or workout twice a week by November 1).

It is important to remember that the goal itself is just a landmark or signpost to use as you move forward in life – they are not chiseled in stone. These goals need to be more than just a glorified “to do” list. I encourage you to set exciting, challenging (but not unrealistic) goals and to welcome the occasional failure that inevitably accompanies this kind of courageous striving.

Business and/or Personal Goals for the next 6 months

By When

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____