

# Coaching Intake Form

Personal Information: Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: M / F

|                         |  |                 |
|-------------------------|--|-----------------|
| First Name/Middle Init. |  | Comments/Notes: |
| Last Name               |  |                 |
| Address 1               |  |                 |
| Address 2               |  |                 |
| City                    |  |                 |
| State/Province          |  |                 |
| Country                 |  |                 |
| Zip/Postal Code         |  |                 |
| <b>Business Address</b> |  |                 |
| City                    |  |                 |
| State/Province          |  |                 |
| Country                 |  |                 |
| Zip/Postal Code         |  |                 |
| Home Phone              |  |                 |
| Business Phone          |  |                 |
| Fax                     |  |                 |
| <b>Email Address</b>    |  |                 |

The issue of confidentiality is paramount to this relationship. My understanding is that nothing in this relationship is to be discussed outside of our conversations. There are times when references to others may be helpful, however I would not ever mention a name or person that would lead someone to infer the discussion was about you as a client.

What do you want to change or improve now? \_\_\_\_\_

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Why are you seeking change now? \_\_\_\_\_

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How will you know when you have achieved what you want? \_\_\_\_\_

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What in your current situation upsets you the most? How do you know you are upset?

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What is most important to you in your life and how do you know that?

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What are your major concerns and why? \_\_\_\_\_

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\_\_\_\_\_

List your top five values:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What is your personal vision?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In twenty-five words or less, write your personal purpose/mission:

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are your primary business/professional goals?

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List five goals you have currently (Now Vision):

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List five goals you want to accomplish within the next 12 months (Near Vision):

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- ---
- ---
- ---

List five goals you want to accomplish in your lifetime (Far Vision):

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What are you willing to do to achieve your goals?

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What are your professional strengths and assets?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What is holding you back?

(i.e., unhealthy relationships, recurring problems, limiting beliefs, unproductive habits, disorganization, etc.).

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What accomplishments are you are most proud of in your life and why?

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What do you most want to get out of our coaching relationship?

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How would you know if you are getting it?

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Comments: (Please note any other issues that are important for me to understand as your coach, e.g. physical, psychological, belief issues)