

Client Data Form

Name:

Date:

Occupation:

Business Name:

Home Address:

Preferred Address:

Business Address:

Preferred Address:

Day Phone: Evening Phone:

Fax Line: Cell Phone:

E-mail address:

Okay to leave messages everywhere? If not, explain:

Preferred means of communication: Phone:

E-mail:

Date of Birth: Age:

Other Significant Dates:

Preferred Coaching Schedule on (day of week) (time of day)

Names of important people in your life (spouse, partner, children, friends, Etc.)

Emergency Contact:

How did you hear about my coaching services?

What influenced your decision to work with a coach?

Have you ever been coached? If so, please describe the experience:

Do you have specific goals for the coaching relationship? If not, what goals might you now create?

What are your significant commitments?

What would your perfect life look like?

What are your dreams?

What dreams have you given up on?

Where do you want to focus first?

PERSONAL VISION STATEMENT

I strongly believe that we are each the creator and director of our own life drama able to create “on purpose” what our life will look like, feel like, and be like.

It is your opportunity and responsibility to write the script, be the producer and director, and to gather the other characters in your life drama. Some people live painful dramas or unfulfilling dramas, but if you are conscious and on purpose with what you want your life to be, it has a much greater chance of evolving into your vision.

So how does one begin designing one’s life? First of all you can begin to revisit and remember dreams and desires from your younger years. What drove you? What did you want to become? Who did you admire? Divide your life into thirds and ask yourself what accomplishments or happy events occurred in each third of your life? What values were represented? Are those values still present?

Exercise: My personal lifestyle

Read through the following sentences and answer as if your life were exactly as you would like it to be. Let this be an accurate reflection of what you envision for your ideal life. After you have completed all these pieces of your Personal Vision, you can write a summary paragraph that encapsulates all your intentions, desires and values.

1. In my family I am committed to _____ (spending time with enjoying, teaching, working with, taking care of) my _____ (spouse, partner, friends, family and/or children).
2. For recreation and fun, I enjoy _____
3. My home environment will be _____ (nurturing, comfortable, a place for entertainment, on the water, spacious, have a home office, in the city, in the country, etc.).
4. My retirement home will be _____ (a cabin in the mountains, a seaside condo, a small restored Victorian home, a large, spacious home to accommodate visiting grandchildren, and guests, a large motor home, a houseboat).
5. My hobbies, passions, interest are _____ (world travel, politics, reading, writing, sports, gardening, martial arts, etc.)
6. I will maintain (or regain) my health by _____ (exercising, eating healthy foods, lowering my stress, meditating, etc.)

Exercise: My professional life

1. I will concentrate my practice in the areas of _____ (fill in with niche or types of clients).
2. My office environment will be _____ (spacious, comfortable, a home office, efficient, well-organized, etc).
3. My financial plans are to _____ (earn a minimum of _____ per year, save 20% of my income, leverage my investments to retire at age _____ with a yearly income of _____, allow for 4 vacations a year, buy a retirement home, etc.).
4. My business philosophy is one of _____ (integrity, leadership, dedication to my clients, providing superior coaching and modeling for my clients, being known as an expert in my specialty, etc.)

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