



318 NE 5th Ave, Camas, WA 98607 * 360-834-3300

Client Intake Information

PERSONAL INFORMATION

Date: _____

Name: _____

Professional / Business Name: _____

Address: _____

Phone: _____

Fax: _____

Cell: _____

E-mail: _____

Website: _____

Educational Background

- High School
- College
- Post-Graduate

What are your interests, hobbies and special talents?: _____

What type of coaching are you seeking?

- General Life Coaching
- Financial Coaching
- Small Business Coaching
- Career Coaching

Have you worked with a coach before?

- Yes
- No

GENERAL LIFE COACHING

Please explain generally, your life condition and concerns if any: _____

Rate your level of satisfaction in each area on a scale from 1 to 10 (place an X where you rate, 10 being the highest). Note one thing you could do to improve in that area:

Physical Environment: 1 ----- 5 ----- 10

Improve by: _____

Health & Fitness: 1 ----- 5 ----- 10

Improve by: _____

Work & Career: 1 ----- 5 ----- 10

Improve by: _____

Financial Situation: 1 ----- 5 ----- 10

Improve by: _____

Life Management: 1 ----- 5 ----- 10

Improve by: _____

Personal Growth: 1 ----- 5 ----- 10

Improve by: _____

Friends & Family: 1 ----- 5 ----- 10

Improve by: _____

Relationships: 1 ----- 5 ----- 10
Improve by: _____

Fun & Recreation: 1 ----- 5 ----- 10
Improve by: _____

Communication skills: 1 ----- 5 ----- 10
Improve by: _____

Character & Integrity: 1 ----- 5 ----- 10
Improve by: _____

Emotional Well Being: 1 ----- 5 ----- 10
Improve by: _____

Overall Quality of Life: 1 ----- 5 ----- 10
Improve by: _____

What are your top 3 priorities or goals you wish to accomplish in the next 3 to 6 months?

- 1) _____
- 2) _____
- 3) _____

What is something you MUST do during your lifetime? _____

If you knew you could do anything and you could not fail, what would you do? _____

FINANCIAL COACHING

Please explain generally, your financial condition and concerns: _____

Do you follow a financial budget?

Yes

No

What is your total monthly take home household income? _____

What are your total household expenses? _____

What percentage of your income are you currently saving? _____

How much do you have in liquid savings? _____

What is the amount of your debt excluding your home mortgage? _____

What are your income goals for the next 2-5 years? _____

What are your savings goals for the next 2-5 years? _____

What are your financial interests or concerns (check all that apply)

Debt Reduction

Cash Flow Enhancement

Retirement Planning

Education Planning

Home Purchase

Mortgage Acceleration

Insurance (protection)

Financial Goal Setting

Financial Health Analysis

Credit Repair

Please share any other information that may apply to your Financial Coaching needs: _____

SMALL BUSINESS COACHING

Explain briefly your business condition and concerns: _____

How many years have you been in business? _____

What is your target market and market geography? _____

What is your unique offering to the market? _____

Who is your ideal customer? _____

What is your business excelling at? _____

Where could your business use improvement? _____

Do you have and follow a business plan?

Yes

No

What are your business objectives for the next 2-5 years? _____

What are your business interests or concerns (check all that apply):

Reducing Expenses

Better Target Marketing

Improving Accounts Receivable

Work / Life Balance

Business Planning

Increasing Revenue

Optimizing Cash Flow

Optimizing Talent & Staffing

Time Management

Improving Customer Service

Please share any other information that may apply to your Business Coaching needs: _____

CAREER COACHING

Explain briefly your career condition, concerns & objectives: _____

How long have you been unemployed / underemployed? _____

What position or career path are you interested in? _____

What annual income do you desire? _____

What talents / skills do you have? _____

Please describe your "perfect" career / job: _____

What career building strategies are you seeking?

Creating a better resume

Networking skills

Self-Marketing

Developing better interview skills

Defining / finding an ideal career

Salary Negotiation

Please share any other information that may apply to your Career Coaching needs: _____

Thank you for taking your time to complete this Intake Form!

Fax or E-mail the completed form to the addresses below:

