

**COACHING
INTAKE & INFORMED CONSENT FORM**

Date: _____

CLIENT INFORMATION:

Name: _____

Phone:(Home) _____ (Work) _____

May I leave you a voice message at this/either number? Yes___ No___

Fax: _____ E-mail: _____

Address: _____ City: _____ State: _____ Zip: _____

May I send mail to you at this address? Yes___ No___ May I e-mail you? Yes___ No___

Sex: Male _____ Female _____ Date of Birth: _____

Others living at home: _____

Employer: _____ Position: _____

How long have you worked at this job? _____

Highest level of education attained: _____

Primary physician: _____ Phone: _____

List any significant health problems: _____

List any medications you are presently taking & the dosage: _____

Are you now, or have you ever been in therapy? Yes _____ No _____

If yes, when? _____ Name of therapist: _____

Brief description of issues worked on: _____

Have you had coaching/consultation before? Yes _____ No _____

If yes, when? _____ Name of coach/consultant: _____

Brief description of issues worked on: _____

Referred by (therapist, physician, yellow pages, friend, business, etc.) _____

Nearest relative, other than spouse: _____

Phone: _____ Relationship to you: _____

FINANCIALLY RESPONSIBLE PERSON'S INFORMATION (if different from above):

Name: _____ Relationship to client: _____

Phone:(Home) _____ (Work) _____

Address: _____ City: _____ State: _____ Zip: _____

Social Security Number: _____ Date of Birth: _____

Employer: _____ Position: _____

FINANCIAL AGREEMENT:

Rates

Call in for free initial telephone consult of 15 minutes

Initial 60 minute coaching session fee* is \$180.00

Fee* per 45 minute coaching session is \$135.00

Fee* per 60 minute coaching session is \$180.00

You may choose to pre-pay in sequences of 3 sessions. (5% discount pre-paid in full)

Additional fee* per quarter hour (15 minutes) is \$45.00

(* Fees are subject to change every six months)

Special Packages

Relationship Assessment Package (TBA)

Introductory Package

6 coaching sessions of 45 minutes or 60 minutes (10% discount pre-paid in full)

45 minute - \$810.00 (10% discounted rate - \$729.00)

60 minute - \$1,080.00 (10% discounted rate - \$972.00)

Basic Package

12 coaching sessions of 45 minutes or 60 minutes (15% discount pre-paid in full)

45 minute - \$1,620.00 (15% discounted rate - \$1,377.00)

60 minute - \$2,160.00 (15% discounted rate - \$1,836.00)

Advanced Package

24 coaching sessions of 45 minutes or 60 minutes (20% discount pre-paid in full)

45 minute - \$3,240.00 (20% discounted rate - \$2,592.00)

60 minute - \$4,320.00 (20% discounted rate - \$3,456.00)

Additional per quarter hour (15 minutes) will be charged over and above or deducted from the paid package, as agreed upon.

CANCELLATION POLICY

While generally sessions are scheduled weekly in 45 minute or 60 minute coaching sessions, they are designed according to your needs and are **in quarter hour increments**. Your time has been reserved for you. **48** hours notice is required for cancellation or you will be charged the regular 45 minute session fee.

PAYMENT POLICY

Payment is due in full at the time of each session. You may pay by cash, check or credit card. We accept VISA and MASTERCARD. You may also pay via PayPal. To save time in session, you may provide us with your credit card number and we will bill out sessions only as they are used by you, or for the sequence of sessions or package you authorize.

Charges will be added to your account for other professional services which you authorize, such as phone contacts (over 5 minutes), e-mails, preparation of special forms, reports, etc. The fee for these services is the same as your agreed upon fee above, per quarter hour increments. Fees are subject to change every six months.

VENUE:

I would like to utilize the following type(s) of coaching. My coach has explained the pros and cons of each venue:

- By telephone
- By Internet/e-mail
- Video conferencing via Internet

CHECKING IN:

Your coach checks in with his/her email or answering service/voice mail at least once a day. When leaving a message on the voice mail, please state your name, phone number and message in a clear and deliberate manner. Generally, we do not return calls on weekends. In the case of an emergency and you cannot reach us, you can call one of the emergency numbers given to you at your initial session.

Please note that coaching is not recommended for clients who feel they may need emergency sessions.

CONFIDENTIALITY STATEMENT:

All information shared in session is confidential except in circumstances governed by the laws including the mandatory reporting of alleged harm to self or harm to others and in the case of child, handicapped person, or elder abuse. We are required by law to report such confidences to the proper authorities.

We/I can verify that all information shared by phone or e-mail on my end will be confidential; however, we/I cannot guarantee that on your end. It is up to you to ensure your e-mail and phone are protected.

COACHING GOALS:

Coaching is a service that therapists with specialized training are equipped to provide. It is designed primarily to assist clients in goal achievement. It is different than traditional psychotherapy and while it may often include therapeutic techniques, it is not psychotherapy. If, during the course of coaching, we find that you would benefit from psychotherapy or medical services, (or that therapy would be more appropriate for you than coaching) we will make that recommendation and try to help make a referral for you. If you choose to seek psychotherapy services in addition to your coaching, I have found that it is more effective if provided by a different therapist. Please let me know if you are seeing a therapist concurrently with coaching. If you would like me to confer with your therapist, you will need to sign a written authorization.

Briefly state your goal(s) for your coaching program:

STATEMENT OF UNDERSTANDING:

My coach has reviewed this client-coach agreement with me and explained it to me so that I both understand it and am agreeable to it.

CLIENT

DATE

SPOUSE/PARTNER, etc. (relationship to client)

DATE

COACH

DATE

PARENT OR GUARDIAN IF MINOR

DATE