



**COACHING CLIENT INFORMATION FORM**

Date: \_\_\_\_\_ Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Age: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Email: \_\_\_\_\_

Sex: \_\_\_\_\_M \_\_\_\_\_F Cell #: \_\_\_\_\_ Home #: \_\_\_\_\_ Work #: \_\_\_\_\_

Place of Employment: \_\_\_\_\_ Title: \_\_\_\_\_

Best time and place to call you: \_\_\_\_\_

In case of an emergency contact: \_\_\_\_\_ Phone number: \_\_\_\_\_

**APPOINTMENT REMINDERS AND ONLINE SCHEDULING**

After your initial appointment, you may schedule appointments online at your own convenience. Please keep in mind that cancelling appointments within 24 hours will result in a fee of \$150.00. If you do not wish to use the online scheduling feature, you may continue to schedule appointments in person or by phone. *To schedule an appointment online, go to [www.cindyhatcher.com](http://www.cindyhatcher.com) and click on "Book Now". Enter your login and password as you have chosen below.* You also have the option to receive a reminder of your appointments via email, text to your cell phone, or a computer generated message to your home phone the day before your scheduled appointments.

Requested Login Name (15 char max, letters and numbers only): \_\_\_\_\_

Your Temporary Password is: [hope2019](#)

Please select **ONE** of the options below to receive your appointment reminders:

- Via email to email address listed above.
- Via text to cell phone listed above. (Normal text message rates apply.)
- Via automated phone message to the home phone listed above.
- None. I'll remember my own appointments. Missed appointment fees will still apply.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)



How were you referred to me? \_\_\_\_\_

If a professional referred you to me, may I send him/her a thank you note? \_\_\_\_YES [ ] NO [ ]

Name: \_\_\_\_\_ Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Religious preference: \_\_\_\_\_ Rate your level of faith at present: 1 (low) –10 (high): \_\_\_\_\_

Education: (Circle the highest level achieved): Elementary Jr. High High School (GED)  
Some College Technical or Training School

Degree(s): \_\_\_\_\_

Marital Status: (Circle) Single Engaged (since\_\_\_\_) Married (since\_\_\_\_)  
Separated (since\_\_\_\_) Divorced (since\_\_\_\_) Widowed (since\_\_\_\_) Cohabiting (since \_\_\_\_)

Current Partner: 1<sup>st</sup> name: \_\_\_\_\_ Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

List by name the members of *your current family* in order of their age:

Name	Age	M/F	Adjective Describing Them
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

List any important information about your life/family such as major life adjustments, health issues, traumas, or unusual circumstances: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Describe what you would like to achieve with coaching. What are your goals?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



How have you attempted before now to reach the above goals?

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What is getting in the way of these goals being met?

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Other agencies or individuals from whom you have received (or are now receiving) coaching:

Name

Address

Date

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What are you most passionate about? What makes you “come alive”?

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What is missing in your life currently in order to have that “successful and satisfied life”?

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Why start coaching now?

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Describe your spirituality. What is your relationship with God? In what ways do you sense God might be challenging you, nudging you in a different direction, or trying to get your attention?

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What three things do you tend to procrastinate about the most?

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How do you like to be supported or held accountable?

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How will you know how effective your coaching sessions have been?

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What else would you like for me to know?

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### **LIFE FULFILLMENT SURVEY**

What does fulfillment in life look like to you? What would you like to change or not change in your life? Consider the following areas of life and ask yourself, "How satisfied am I in this area?" There is may be room to grow and develop in every area, but what stands out as needing some time, attention, and intention? What would make the biggest impact on your life if it were to improve?

Rate each area on a scale from 1 – 10. If you give an item a 1, you are completely dissatisfied with this part of your life. It means, "This part of my life is entirely unacceptable to me in its current state." A number 10 means "I couldn't be happier or more satisfied with this area of life." Your overall satisfaction will change from day to day, but try to give an overall assessment of where you are at present.

1 = Completely dissatisfied      10 = I could not be happier

- \_\_\_\_\_ Physical Health
- \_\_\_\_\_ Mental/Emotional Health/Attitude
- \_\_\_\_\_ Career/Employment Satisfaction
- \_\_\_\_\_ Financial Stability
- \_\_\_\_\_ Marriage/Romantic Relationships
- \_\_\_\_\_ Home Life (Immediate Family)
- \_\_\_\_\_ Extended Family (Relatives, In-laws)
- \_\_\_\_\_ Friends/Social Life
- \_\_\_\_\_ Recreation/Relaxation/Leisure
- \_\_\_\_\_ Lifestyle (Degree of Busyness and Life Balance)
- \_\_\_\_\_ Personal Life Fulfillment
- \_\_\_\_\_ Spiritual and/or Religious Health/Life
- \_\_\_\_\_ Physical Comfort (Housing, Neighborhood, Possessions, Cars, etc.)
- \_\_\_\_\_ Other (please explain):

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## **COACHING CONTRACT**

**Client Name:** \_\_\_\_\_

This agreement, between coach Cindy Hatcher and the above-named client will begin on \_\_\_\_\_ and will continue for a period of: \_\_\_\_\_ month(s) ending on \_\_\_\_\_.

### **Fees**

The fee for the initial coaching session is \$150 an hour. This fee will be paid in advance or at the time of service. After the initial session, a coaching package of 1 month, 3 months or 6 months must be purchased in order to proceed. Basic Coaching packages are charged as follows:

- 1 month = \$997
- 3 months = \$2497
- 6 months = \$4997

This contract is for a package period of \_\_\_\_\_ month(s) including \_\_\_\_\_ weekly appointments per month and unlimited email contact for the duration of the package.

Once a package is completed and you only require a few more check-ins versus another package or want to spread sessions out further, 1-hour appointments can be purchased as follows:

- 1 session = \$247
- 3 sessions = \$697
- 5 sessions = \$997

If you need to cancel an appointment, please provide at least 24 hours notice for the above or you will be charged for the appointment or it will count towards your package limits.

### **Services**

The services to be provided by the coach to the client are face-to-face, online video or telephone-coaching, as agreed jointly with the client. Coaching may address specific personal projects, business successes, or general conditions in the client's life or profession. Other coaching services include value clarification, brainstorming, identifying plans of action, examining modes of operating in life, asking clarifying questions, and making empowering requests or suggestions for action.



Throughout the working relationship, the coach will engage in direct and personal conversations. The client understands that successful coaching requires a co-active collaborative approach between client and coach. In the coaching relationship, the coach plays the role of a facilitator of change, but it is the client's responsibility to enact or bring about the change.

If the client believes the coaching is not working as desired, the client will communicate and take action to return the power to the coaching relationship.

### **Prior History**

The client also agrees to disclose details of the past or present psychological or psychiatric treatment. Coaching and counseling are not the same as described on the website [www.cindyhatcher.com](http://www.cindyhatcher.com).

Although I am a Licensed Professional Counselor and Licensed Marriage and Family Therapist, I will NOT be providing mental health counseling services to you. Therefore, if for any reason you may require mental health counseling services, I will refer you to another provider.

In entering into the coaching relationship, and signing the agreement, you are agreeing that if any mental health difficulties arise during the course of the coaching relationship, you will notify me immediately so that I can discuss with you an appropriate referral.

### **Confidentiality**

All of our communication becomes part of a coaching record. Records are property of my confidential files. Adult client files are disposed of five years after the file is closed. Minor client records are disposed of five years after the client's 18<sup>th</sup> birthday.

The coach will work within the professional ethics and guidelines as designated by the International Coaching Federation (see [www.coachfederation.org](http://www.coachfederation.org))

If you wish for me as your coach to speak to someone outside our interactions, then you need to give me written permission (Signed Consent to Release Form) to do so. Exceptions to confidentiality of course relate to circumstances such as intent to seriously harm self, someone else, child/elderly/disabled person abuse, etc., of which I am legally bound to report by law. Otherwise, all your information is confidential.

It is also important to note that in some situations, it is important to be aware of the use of technology in that for some clients, there is a risk in using certain media such as the internet,



mobile phones and cordless phones. If you use these to communicate with me, then I will assume that it is appropriate to continue to do so in my interactions with you.

**Termination**

The coach and client agree to provide each other with two weeks’ notice in the event that it is desired to terminate coaching. Otherwise, the coaching will continue for the duration of the contracted period.

*I believe that each of my clients is a unique, creative and responsible person who is in charge of moving their own life forward. I very much look forward to working with you.*

Our signatures on this agreement indicate full understanding of, and agreement with, the information outlined above.

\_\_\_\_\_  
Coaching Client Date

\_\_\_\_\_  
Life/Relationship/Leadership Coach Date

**Continuing Coaching Accreditation**

As a separate issue, it is also important to inform that in terms of continuing accreditation as a coach, the International Coach Federation (ICF) (which is the international accrediting body for coaching) has a policy of verifying that coaching has been conducted. As such, at times, they may ask for the phone number and email of clients to authenticate the claim that I have been conducting coaching. Of course, they may not contact you at all, but you would need to be willing to be contacted if necessary. To that end, you would need to be willing to have your phone number and email listed, if indeed, the ICF chose to verify my claims of coaching. If you are happy to have your phone number and email provided to ICF if they asked for it, please sign below that you are in agreement that this could occur.

\_\_\_\_\_  
Coaching Client Date