



Client Intake Form “Getting to Know You”

Coaching is more effective and efficient if you can share some insights about yourself at the beginning. This is confidential, and you are free to skip any of the questions. I encourage you to share as much information as possible in order to optimize our coaching relationship.

Name: _____ Name you like to be called: _____

Address: _____

Address 2: _____

City: _____ State: _____ Zip: _____

Phone (Home): _____ (Work): _____ (Mobile): _____

Preferred phone number on which I may leave a message: _____

Preferred phone number on which I may leave a text: _____

Email: _____

Occupation: _____ Employer’s Name: _____

Date of Birth: _____ Marital Status: _____

Significant Other’s Name: _____

Names and Ages of Children:

Name	Age	Name	Age

Life Satisfaction Questionnaire

How satisfied are you with different areas of your life? Select a number from 1 to 10 next to each of the following areas of your life. 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
- _____ Career/Employment/School 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 Health/Life
- _____ Church/Religious Life
- _____ Physical Comfort (Housing, Neighborhood, Possessions, Cars, etc.)

1. Why do you want coaching? Be specific as possible. Examples: "I want to start an exercise program to gain more energy and to lose 30 pounds." "I want to improve my relationship with my children by listening to them and what is going on in their lives." "I want to prioritize my relationship with my spouse by taking walks with him/her 2 times a week and scheduling regular date nights."

2. Are you or have you ever been in counseling or therapy? Yes No
If yes, please explain.

3. 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.

4. What are the most important things (positive and negative) happening in your life right now?

5. In what ways would you like your life to be different one year from now?

6. What is “getting in the way” of these goals listed above?

7. How might you sabotage yourself as you work toward your goals, or how might you sabotage me as your coach?

8. List at least three things you procrastinate at—the things that you’ve been putting off.

9. What, if any, are your concerns about coaching?

10. Rate the level of stress in your life on a scale of 1 to 10. (1=low and 10=high)

11. What are your primary stressors?

12. How or why did you select me as your coach?

13. What would you like me to do if you fall behind in progress toward your goals?

14. How do you like to be supported or held accountable?

15. What else would you like me to know about you?

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Freedom. Focus. Fulfillment.

FranVan Coaching, LLC • Frances L. Van Voorhis, PhD, CPLC

6424 Morrowick Circle Drive • Charlotte, NC 28226
704.442.7235 • www.franvancoaching.com • info@franvancoaching.com