



## Personal Fact Sheet and Client Agreement

The following items constitute some preliminary information that will assist me in understanding you and your needs. Take as much space as you need; don't restrict yourself to the space available on this sheet. If you prefer not to respond to any of the items, leave them out. If applicable, we can explore those items at a later date.

- All personal information is strictly confidential and treated appropriately.
- **Please fill this out and return it to me at the below email address. Also print and sign the hard copy and send it to the address below.**

### Client information

Full name \_\_\_\_\_

Name you like to be called \_\_\_\_\_

Address \_\_\_\_\_

### Contact Information

Home telephone \_\_\_\_\_ Business Telephone \_\_\_\_\_

Cell phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

### Employment Information

Occupation \_\_\_\_\_

Business Address \_\_\_\_\_

### Personal Information

Your date of birth \_\_\_\_\_ Marital status \_\_\_\_\_

Key people in your life: \_\_\_\_\_

Referred by \_\_\_\_\_

### Recording

May I periodically record my sessions with you to aid me in my professional growth? I alone will listen to these recordings and they will be used for no other purpose. \_\_\_\_ Yes \_\_\_\_ No

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I understand that coaching does not provide treatment, therapy or diagnosis and I agree to see my physician, therapist or qualified helping professional for such needs.

I am the expert in my own life. I acknowledge full responsibility for myself to the best of my present abilities and awareness. I agree to wholeheartedly participate with my coach to make my coaching experience positive and useful.

I agree to meet all financial responsibilities promptly unless other arrangements have been made.

I understand that a charge will be made for all time reserved unless cancelled 24 hours in advance.

Signature \_\_\_\_\_ Date \_\_\_\_\_

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