

Aging with Distinction
agingwithdistinction@gmail.com
www.agingwithdistinction.com

Client Intake Form

Aging with Distinction is happy to welcome you as a new client. We are excited that you chose us to help you achieve your personal goals. Please complete the following information and return it via email, mail or fax so that we can get started.

Date: _____

Individual Client

Name: _____

Corporate Client

Name: _____

Title: _____

Contact Information

Address: _____

City: _____

State: _____ Zip Code: _____

Work/Type of Business: _____

Number of years Employed: _____

Business phone: _____

Fax: _____

Home phone: _____

Cell phone: _____

Email: _____

Date of birth: _____

Spouse/Partner's name _____

Children's name/ages _____

Session Day/Time/Frequency _____

Start Date: _____

Fees and Payment Option

Monthly Fee _____ Per Session _____

Check _____ Pay Pal _____

Visa/MC (card number and expiration date): _____

Joanne Kanute, BCMCLC, CSA
Board Certified Master Certified Life Coach
(520)405-6787 Fax: (520)790-8494

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Disclaimer:

The client is aware that the coaching relationship does not represent psychological counseling or any kind of therapy. The client is also aware that coaching results can vary and are not guaranteed. The Client agrees that he/she is entering into coaching with the understanding that the Client is responsible for his/her own decisions and results. The client also agrees to hold the Coach free from all liability for any actions or results for adverse situations created as a direct or indirect result of advice given by the Coach.

(Client Initials): _____

Session Contact Procedure:

The Client shall contact the Coach at the agreed hour. If the Client fails to make the appointment time, the Client is still responsible for the coaching fee, unless 24 hour notice was given to reschedule the call/meeting. The Coach will make every effort to reschedule with the client.

Client Signature

Date

Coach Signature

Date

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Important Issues

Please briefly outline any issues you would like to deal with and what you hope to achieve in the coaching setting:

Issue # 1

Issue # 2

Issue #3

Personal Profile

Please answer the following to let us get to know you a little better:

1. I would describe myself as:
2. Others would describe me as:
3. The three things that I like most about my life/situation are:
4. If I could change three things about my life/situation, they would be:
5. My three greatest accomplishments (so far) are:
6. Some of my hobbies/interests are:
7. The one thing I would like most to accomplish (but haven't yet) is:
8. The one thing I wish I could change in the short-term is:

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9. I think that the most important thing in life is:

10. I am interested in working with a life coach because:

How did you hear about my coaching services?

Please tell me about your family.

Are you willing to make changes in your life?

So you find yourself sabotaging your own success?

Current relationship with God:

Education and special training:

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