



## Life Coach/Strategy Intake Form

Please provide the following Information. The information you provide is confidential just like your Life Coaching or Mentoring Sessions.

Date:

\_\_\_\_\_

Name:

\_\_\_\_\_  
(First) (Last) (Middle Initial) Name of parent/guardian (if you are a minor):

\_\_\_\_\_  
(First) (Last) (Middle Initial)

Birth Date: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: Male or  
Female: **(Circle One)**

Address:

\_\_\_\_\_  
(Street and Number) (City) (State) (Zip)

Home Phone: ( ) \_\_\_\_\_ May we leave a message? (Circle One): Yes /No

Cell/Other Phone: ( ) \_\_\_\_\_ May we leave a message? (Circle One): Yes /  
No

\_\_\_\_\_ email: May we email you? o Yes / No

\*Please be aware that email might not be confidential.

Marital Status:

Never Married / Partnered or Married /Separated or Divorced /Widowed

If married, name of spouse:

\_\_\_\_\_

Name of Children and ages:

\_\_\_\_\_  
\_\_\_\_\_

Referred by: (check any that apply)

Internet Search

Family or Friend

Website Social Media: other:

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# Life Strategy Agreement

Date:

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Name:

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Our sessions are conducted over the phone and virtual (Skype, zoom, Facetime, etc.).

You may reach me via cell phone: \_\_\_\_\_ or Email: \_\_\_\_\_

Missing or rescheduling sessions is strongly discouraged. If an unforeseen event does require you to reschedule, I must be notified 24 hours prior to the scheduled session. It is very important that we work together to make sure that your scheduled session to strategize, overcome obstacles, and establish next steps.

If notification is not given 24 hours prior to the scheduled session time, the session will be considered missed and thereby forfeited.

Life Coaching Disclaimer of Liability: Client hereby employs as Life Coach for the purpose of supporting the Client with respect to Client's self-awareness, vision and goals, and strategic plans, has experience in such matters and agrees to render such coaching services.

I have read and agreed to the Policies and Disclaimer of Liability.

Client's Signature (Date)

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Life Coach's Signature (Date)

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Patricia Armani

Once you have completed this form, please Fax or Email it to me or bring it to the initial session. Any questions, be sure to contact me.

## Personal/ Professional Goals:

What are the biggest changes you want to make in your life in the next 3 months?

1 .

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2.

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3.

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What are the biggest changes you want to make in your life over the next 3 years?

1 .

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2.

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3.

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What do you most want to achieve for yourself in your life/career?

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What are the restraining forces keeping you from achieving these?

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What would you say have been your 3 greatest accomplishments to date?

1.

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2.

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3

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What do you expect to achieve in life because of hiring me as your life coach?

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What is the hardest thing in your life that you have had to overcome?

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What major transitions or changes have you had in the past two years? (Example: Entering or approaching a different age, a new or different relationship, job role, residence, a change in children's ages/stages, etc.)

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Who are or have been your major role models? Why?

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Have you worked with a coach before or a similar one-on-one adult relationship (e.g. tennis coach, piano teacher, and therapist)?

If so, what worked well for you and what did not work in the relationship(s)?

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Who will be supporting you through this process?

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## Life Changes

Please list any changes you would like to make in the following areas: Family:

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Money / Financial Situation:

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Career / Business life:

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Service / Personal Character:

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Relationships:

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Friends:

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Living

Space / Home:

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Personal Growth / Learning:

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Health / Self Care:

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Creativity:

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Play /

Leisure time:

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## Leisure:

Hobbies:

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What do you spend most of your leisure time doing?

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Your Life Story I History: What would you like to share with me?

Lined area for writing the response to the question above.

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(Use back if more space needed) 5

On a scale of 1 to 10 with 10 high, rate the quality of your life today. \_\_\_\_\_

List five things that you're personally tolerating or putting up with in your life at present. (Examples: information you can't find, clutter, rude friends, tight shoes, dented cars, job dissatisfaction, dead plants, broken equipment, cranky people in your life etc.)

1 .

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2.

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3.

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4.

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5.

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In a typical week, what do you spend a great amount of time doing?

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What are your primary stressors? (What stresses you out?)

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On a scale of 1 to 10, 10 high, rate the amount of stress in your life right now. \_\_\_\_\_