

Self Sense Coaching

Confidential Information Form

Name: _____ Name you prefer to be called: _____

Date: _____ Date of Birth: _____ Age: _____ Marital status: _____

Please complete both addresses and check preferred address for correspondence.

Home Address: _____

Business Address: _____

Home Phone: _____ Work Phone: _____

Cell Phone: _____ Fax Phone: _____

E-mail Address: _____

Okay to leave messages anywhere? Yes No If not, please give instructions on where to leave messages: _____

Occupation: _____ Length of time in current position: _____

Business Name: _____

Brief description of job or business: _____

Names of important people in your life (spouse, partner, children, friends, etc.):

Name	Relationship	Sex	Age	✓ If Lives with You
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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Who referred you (person, organization, or website) or how did you learn of my service?

What influenced your decision to work with a coach? _____

What are your goals for the coaching relationship? _____

Where do you want to focus first? _____

Is there any other information you want me to know? _____

I offer a periodic email newsletter on issues of personal growth. Would you like me to add you to my email list? Yes No

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Client Policies and Procedures

Welcome to *Self Sense Coaching* with *Glenn Stevenson*. I look forward to working with you. There are a few guidelines that I ask clients to follow in order for our relationship to work well. If you have any questions, please call me.

- CALLS/APPTS.** Make your coaching call or appointment on time. Come to our meeting with updates, progress, and current challenges. Let me know what you want to work on, and be ready to be coached. **Complete and return a client prep form by email or fax before each call or meeting. The agenda is client generated and coach supported.**
- FEE** I offer coaching by the session or in “packages” of 4, 8, or 12 sessions. The “packages” offer discounts compared to the per-session fee. I accept cash, check, major credit cards, or PayPal. Checks returned for insufficient funds incur a \$25 fee.
- SESSIONS** Whether you pay per session or purchase a “package,” you may pursue coaching at any pace you wish. I do suggest, however, that you begin with either weekly, 3 times per month, or every other week sessions. Later, monthly or less frequent sessions may work.
- CHANGES** Please give me 24-hours notice if you have to cancel or reschedule a call or appointment. We can work out scheduling changes due to illness or an emergency. Cancellations less than 24 hours in advance incur half the pro-rated session fee.
- EXTRA TIME** You may call between sessions if you need “spot coaching,” have a problem, or really wish to share a win. You may also fax or email me. I am pleased to deliver this extra level of service. I do not bill for this additional time, but I ask that you keep extra calls to five to ten minutes. When you leave a message, let me know if you want a call back or if you just want to share something with me.
- PROBLEMS** I want you to be satisfied with our relationship. If I ever say or do anything that upsets you or does not feel right, please let me know. I promise to do what I can to satisfy you.
- CLIENT COMMITMENT** It is necessary for the client to implement the coaching for it to be successful. You have hired a coach to do things differently than you have done before. If you keep doing what you have always done, you will get the results you have always gotten. So be ready to work and change your life!
- HOMEWORK** Part of client commitment is to do your homework each week. This homework is not like homework you did in school. It is **tasks, actions, or changes** that you commit to yourself to complete before next session, and I am just here to support you in your commitment. You must apply yourself and use the homework to achieve your goals.

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Personal Coaching Agreement

Please review, adjust, sign where indicated, and return to me at the address below.

Name _____

Initial term: _____ sessions for \$ _____ beginning _____

Initial frequency of sessions: _____. Duration of scheduled sessions: _____ minutes.

GROUND RULES:

1. CLIENT PAYS COACHING FEES IN ADVANCE.
2. CLIENT CALLS OR MEETS THE COACH AT THE SCHEDULED TIME.
3. CLIENT PAYS FOR LONG-DISTANCE CHARGES, IF ANY.

1. As a client, I agree that I am fully responsible for my well being during and after my coaching, including my choices and decisions made during coaching and the repercussions of these decisions after the coaching relationship ends. I am aware that I can choose to discontinue coaching at any time without further financial obligation.
2. I understand that personal coaching involves a relationship with my coach that is designed to facilitate the creation and development of personal, professional, or business goals and to develop and carry out a plan for achieving those goals.
3. I understand that personal coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education, and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
4. I understand that personal coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that personal coaching is not counseling, psychotherapy, psychoanalysis, mental health care, or substance abuse treatment. I will not use it in place of these treatments, and I recognize that professional referrals will be given if needed.
5. I attest that if I am currently in therapy or otherwise under the care of a mental health professional that I have consulted with this person regarding the advisability of working with a personal coach and that this person is aware of my decision to proceed with the personal coaching relationship.
6. I understand that information identifiable to me will be held confidential unless I state otherwise, in writing, except as required by law or except: (1) certain information may be shared anonymously with other personal coaching professionals for training or consultation purposes, (2) my name and contact information may be provided to the International Coach Federation for the purpose of verifying coaching hours for credentialing purposes of your coach, and (3) your coach will report to appropriate authorities if he learns of suspected child abuse or neglect or elder abuse or neglect or take steps necessary to mitigate the situation if you become potentially harmful to yourself or others.
7. I agree that I am fully responsible for my coaching fee. I understand that checks returned for insufficient funds will incur a \$25 fee.
8. I understand that personal coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual and other matters. I understand that decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

I have read and agree to the above.

Client Signature

Date

Glenn G. Stevenson