

Coaching For Your Success Client Questionnaire

Dear Client:

Congratulations on choosing a coach to support you through the exciting changes you plan to make in your life. Give yourself credit for making this step as many people only 'dream' of their goals. You have made a commitment to reaching your goals and finding your success in life.

Working with a coach naturally involves a relationship with your coach over an extended period of time. I believe in order to effectively help us both discover who you really are, what you truly value, and what you genuinely want in your life, I would like to obtain some information you may consider personal. Please understand that your information remains confidential only between yourself and your coach.

Lets begin....We have work to do!!!

Name: _____ Date: _____

Address: _____

Date of birth: _____

Telephone Numbers:

Home: _____ Work: _____

Cellular/Beeper: _____

How did you hear about Coaching For Your Success?

What made you decide to work with a coach at this time in your life?

Interpersonal Relationships

With whom do you live? Please list who you live with and your relationship with them.

Name	Relationship

Please explain any significant relationships you have in your life:
(Spouse, significant other, ex-spouse, children):

(Please don't feel limited by space, use the back of this form at any point)

Where do your parents live? Please describe your relationship with your parents. If one or both are deceased please explain your relationship prior.

Who else do you consider significant in your life? Who would you consider to be most significant in your life right now and why?

Are there any relationships other than those listed above that you feel influence or impact you life that would be significant to our coaching relationship?

Physically

Are there any physical conditions that I should be aware of in working with you?

Are you currently taking any medications, vitamins, natural supplements? Please explain:

Please describe any previous hospitalizations, medical emergencies, previous health conditions:

Date of last physical: _____

Please rate yourself on the following scale for both how you see yourself at this time and how you would like to see yourself in one year.

1-Very Poor 2-Poor 3-Average 4-Above average 5-Excellent

(For example I might say a 3 for my physical fitness as how I see it now and put a 4 for where I would it to be in one year)

Physical fitness: _____ One year: _____

Program of daily exercise: _____ One year: _____

Personal Grooming _____ One year: _____

Proper nutrition intake: _____ One year: _____

Relaxation/Stress reduction: _____ One year: _____

Career and Professional

What is your current occupation? Please describe your job:

What is it that you most like about your job? What is it that you most dislike about your job?

What profession have you always dreamed of in your life? What would be your ideal job?

What level of education do you have? Please include names of schools and degrees:

Do you ever consider going back to school? If so, what is that you would want to study? What obstacles are there to you returning to school?

Are you considering changing your career? If so, what have you already done to pursue this?

What would have to happen in order for you to be satisfied and fulfilled in the work that you do?

Financial

What would you consider your socioeconomic level?

Please rate yourself on the following scale of where you see yourself right now and where you would like to see yourself in one year.

1-No satisfaction 2-Minimal satisfaction 3-Average satisfaction
4- Above average satisfaction 5-High satisfaction

Financial security: _____ One year: _____

Current income: _____ One year: _____

Spouse's income: _____ N/A: _____ One year: _____

Percentage in savings: _____ One year: _____

Retirement Plan: _____ One year: _____

Relationship with money: _____ One year: _____

What would you consider your most prized material possessions?

Materially, what is important to you? (i.e. a nice home, nice car, vacations):

What would have to happen in your life for you to feel that you have a sufficient income to live the lifestyle you are working towards? When would you know you have reached your financial goals and what would this look like? (Please describe in behavioral terms):

Self-Growth

What do you consider to be your greatest strengths? (If you have difficulty with this please ask significant people in your life to help you):

What do you consider to be your weaknesses?

What have you done towards self-improvement in the past year? (i.e. reading a book, attending a seminar, working with a therapist or coach):

What are the goals you have had towards self-growth that you have not been able to meet in your life? (i.e. play the piano, start exercising, taking a dance class, join a weight loss group):

If you had the time and money, what would you start today?

How do you spend your leisure time? How satisfied are you with your leisure time? What activities would you like to increase or learn in your life?

Spirituality / Sense of Purpose in Life

What are your spiritual beliefs? Have there been any significant changes in your beliefs in your lifetime?

Do you feel you have a sense of purpose in your life? If so, please describe it:

What is it in your life that you are passionate about?

What do you consider to be your highest values in your life?

What would have to happen for you to feel more in balance spiritually in your life?

If you could change anything about yourself, what would you change?

If you could change anything about your family, what would you change?

If you could change anything about your job/career, what would you change?

Moving Forward in Life

Rate yourself on your level of satisfaction in the following areas of your life:

- 1-No satisfaction 2- Minimal satisfaction 3- Satisfied
4- Moderate satisfaction 5- Very satisfied

_____ Your Interpersonal Relationships

_____ Your Physical Body

_____ Your Career and Professional Life

_____ Your Financial and Material Situations

_____ Your Own Self-Growth

_____ Your Spiritual Connection

Now, rate yourself on where you would like to see your level of satisfaction in 6-12 months:

_____ Your Interpersonal Relationships

_____ Your Physical Body

_____ Your Career and Professional Life

_____ Your Financial and Material Situations

_____ Your Own Self-Growth

_____ Your Spiritual Connection

If there is a discrepancy between your life priorities as they are now and your life priorities as you would like them to be, explain why you think the discrepancy exists and what would have to happen for the focus of your priorities to change.

Please submit your completed questionnaire to:

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