

## CLIENT INFORMATION

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY / STATE / ZIP: \_\_\_\_\_ MARITAL STATUS: \_\_\_\_\_

PHONES Home: \_\_\_\_\_ Work: \_\_\_\_\_ Fax: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

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Is it OK to leave a message at Home ? \_\_\_\_\_ at Work ? \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_ AGE: \_\_\_\_\_ SS#: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_ OCCUPATION: \_\_\_\_\_

NATURE OF BUSINESS/POSITION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMERGENCY CONTACT: \_\_\_\_\_ (Not living with you)

PHONE: \_\_\_\_\_ RELATIONSHIP: \_\_\_\_\_

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Where did you hear about my services? \_\_\_\_\_

Have you experienced coaching and/or career counseling previously? \_\_\_\_\_

If so please describe: \_\_\_\_\_

\_\_\_\_\_

Are there any medical conditions you are currently seeing a doctor for? If yes, please describe: \_\_\_\_\_

\_\_\_\_\_

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METHOD OF PAYMENT: Check \_\_\_ Cash \_\_\_ Credit Card \_\_\_\_\_

**Note: Payment is due at time of service unless otherwise agreed upon by provider.**

# CLIENT COPYRIGHT AGREEMENT

I, \_\_\_\_\_ understand that the information shared in coaching and the Life Purpose Process<sup>®</sup> is confidential. The exercises and printed materials from the Life Purpose Process<sup>®</sup> are copyrighted and may not be copied or used without written permission of Fern Gorin, Director, of the Life Purpose Institute. Notwithstanding these limitations, I may freely share my personal experience of coaching and the Life Purpose Process<sup>®</sup> with others.

\_\_\_\_\_  
Client's Signature

\_\_\_\_\_  
Coach's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# CREATING FULFILLMENT IN YOUR LIFE

In our coaching together, our goal is to support and empower you to create a more fulfilling life and career. Please fill out the following scale to help up assess your current situation and determine the most important areas to work on.

## Current Satisfaction Assessment

Rate each area from 1 – 10 using # 1 as the lowest level of satisfaction and # 10 as the highest level of satisfaction.

*Rate from 1 – 10*

Career	_____
Significant Other	_____
Family	_____
Friends	_____
Physical Health and Well Being	_____
Emotional Health and Well Being	_____
Physical Environment	_____
Finances	_____
Spirituality/Religion	_____
Education/Personal Growth	_____
Fun and Leisure	_____
Lifestyle	_____
Balance in Life	_____

Describe in more detail 1 - 5 areas you'd most like to focus on.

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you could create the results you desired in these 1 - 5 areas, what specifically would you like to achieve in the next 90 days?

What would you have to do or change to make these things happen in the next 90 days.

As a coach, how can I best support you to achieve your goals?

# CREATING FULFILLMENT IN YOUR WORK

Our work together is tailor-made to meet your needs. Please check-mark <sup>v</sup> those goals below that you would most like to focus on.

- Clarify what I'd love to do
- Find a new job
- Start a new business
- Make a decision about which of the options I'm considering that I want to pursue
- Improve my present job
- Improve/create more success with my current business
- Get a raise/promotion
- Look at special career options that relate to a particular interest or talents, for example: All jobs that relate to writing, jobs where I can help children, work in the outdoors, work with my hands, etc.
- Focus on my "Life Purpose" and have a broader context for evaluating my career
- Other \_\_\_\_\_

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What is your timetable for making those changes?

What specifically would you like us to achieve in the next 90 days with your career/business?

What have been your last 3 jobs and/or business ventures?