

New Coaching Client Forms Packet

WELCOME and CONGRATULATIONS on taking the first step to discovering your very own picture of life! Before scheduling our first session, it's beneficial to review and complete this confidential form packet (the best you can) and e-mail it back to me.

Enclosures (to be reviewed in full, signed, and returned via e-mail)

- New Coaching Client Agreements
- Client Intake
- Statement of Intent
- Final Signature of Recognition and Consent

New Coaching Client Agreement

Our complimentary session established you are ready to bring your picture window of life into focus, demonstrating a mutual wish to work with one another. With any relationship, both parties must bring complete clarity and understanding to one another to create a safe space connection.

Basic Shared Agreements

- When entering this specific professional client/coach relationship agreement, it's imperative to acknowledge that a life coach's job isn't to work on the emotional well-being or wounds from the past—that is the job of a professional psychotherapist or counselor for mental health care. The life coach's role focuses on where you are now to move forward and bring clarity and awareness to your personal goals. I bring complete empathy and honor to you without any judgments and believe all your answers exist within yourself. Together, we will work on getting to those answers while focusing on your authentic you.
- Each scheduled session is one hour long and takes place by Skype, Zoom, or phone. Skype and Zoom can be done with or without live video, whichever you prefer most. Any long-distance phone charges are the client's full financial responsibility, not the coach. Also, all sessions are to be paid in full within 24 hours before your first scheduled session and are non-refundable. Payments are accepted via check, credit card, or pay-pal.
- For those purchasing coaching packages, it is recommended to commit to at least two sessions a month every other week. This commitment will establish consistency that can distinguish your very own picture window of life. Sessions may also be spaced out and scheduled however you desire. You may purchase additional sessions or packages appropriate for your desired time frame. You decide what works best for you.
- Our scheduled time is valuable, demonstrating a secure client/coach relationship with a mutual agreement of showing up to all sessions on time with no distractions. A coaching session in a public venue with background noise does not symbolize a comfortable, productive environment.
- Any rescheduling requires a 48-hour minimum notice. I understand emergencies sometimes arise; therefore, only one missed session with notification will be granted a free pass. If any further cancellation/rescheduling occurs outside of the 48-hour policy, your session will have to be forfeited. If this happens **more than two times** (after the granted free pass), a \$25.00 cancellation fee will occur. This fee is part of your motivational self-value to keep you on a consistent path towards enlightenment. Cancellations or rescheduling requests can be made via email, text, or phone only.

Basic Shared Agreements (continued)

- For mutual respect, any session missed without any notice or warning will automatically be forfeited. This absence is **not included as a granted free pass** and will automatically result in a \$25.00 fee for the client to continue their program. If this happens twice, we will review whether or not coaching is suitable for you at this time.
- All clients **currently working with a package program** may have “relapse moments” (i.e., having difficulty deciding on something, etc.). Non-lengthy but not too minimal emails are welcomed outside our scheduled sessions. You will receive an appropriate feedback response ASAP. Depending on availability, we can schedule an uncharged 10-minute chat without or instant message.
- Everything covered in our client/coach relationship is to remain strictly confidential unless the client shows an indication of harming others or themselves. If a client is currently attending counseling from a professional psychotherapist, please continue that process along with coaching. I welcome all clients to be open and honest with their coaching process and communicate what is working best for them. Our time together is all about uplifting and opening yourself to greater possibilities because it’s now your life!

I have carefully read each shared agreement with complete understanding and will honor them during our coaching relationship.

Client (Print/Sign)

Date

Client Information & Intake

To understand where you are in your situation, I welcome you to complete the following information the best you can. It's an honor to learn more about you!

Name:	
Street Address:	
City/State/Zip:	
Country:	

Preferred Email:	
Preferred Phone:	
Alternate Contacts: (i.e., E-mail, Fax, Skype, Google Chat, etc.)	

Occupation:	
Name of Employer:	
Single or Married:	
Children: (how many, ages, etc.)	
Referral Source: (if any)	

Now Your Life

Picture Window of Life

Let's gain an overall perspective of you. Please rate on a 1 to 10 scale how you feel about the following aspects of your life. 10 being TOTALLY SATISFIED and 1 being TOTALLY DISSATISFIED.

Health

1	2	3	4	5	6	7	8	9	10
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Career

1	2	3	4	5	6	7	8	9	10
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Spiritual Alignment

1	2	3	4	5	6	7	8	9	10
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Friendships & Social Support

1	2	3	4	5	6	7	8	9	10
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Fun & Recreation

1	2	3	4	5	6	7	8	9	10
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Financial Well-Being

1	2	3	4	5	6	7	8	9	10
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Romance & Relaxation

1	2	3	4	5	6	7	8	9	10
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Physical Environment

1	2	3	4	5	6	7	8	9	10
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On the following page, answer the following questions and allow yourself to share any additional information you may have.

Now Your Life

Picture Window of Life

Do you already have a vision of your most ideal picture window of life? If so, how does it look?	
What brought a desire to work on and discover your picture window of life?	
What is your biggest dream or your greatest passion within your picture window of life? (Feel free to list more than one)	
What aspect of your picture window of life would you like to work on and discover the most?	
What do you think your most profound purpose is within your picture window life?	
What would you consider to be your greatest strengths and weaknesses right now?	
Do you feel stuck in your life right now? If so, how?	
What kind of a life coach works best for you? An encouraging cheerleader or a coach that pushes and challenges you a bit?	

Now Your Life

Picture Window of Life

If you felt a safe space trusting connection with your coach, what would you tell him or her on collaborating with you most effectively? What kind of tips would you give him or her?	
Are you currently following a method of religion or spiritual practice? If so, what would it be?	
Are you currently involved in an exercise program?	
Are you currently getting enough sleep?	
What is the greatest thing you would like to gain from this coaching experience?	
What would you like to focus on within your very first coaching session (if you intend on proceeding, etc.)	
Is there anything else you feel necessary to share about yourself?	

Take a moment and congratulate yourself on completing this revealing process.

Statement of Intent

All coaching practices with Eric Casaccio are meant to thrive, challenge, uplift, and focus on where you are today and move you forward. During this journey, healing may certainly occur, symbolizing psychological support; however, it is imperative to reiterate that coaching is not psychotherapy. If you are feeling symptoms of stress, anxiety, depression, inability to function, or thoughts of suicide, please seek the guidance of a professional psychotherapist. The life coaching process may enhance your situation with your therapy. Still, the work of a coach is not to work on your past emotional wounds, instead focus on bringing clarity and awareness to your authentic road of personal empowerment in the now. Indeed, it's all about your authentic you at Now Your Life. With complete understanding, please read the following statements and should you agree to each statement and desire to proceed, sign below:

- I am healthy and responsible enough to engage in life coaching services received with Eric Casaccio at Now Your Life.
- I understand and accept that all life coaching services at Now Your Life are not a substitute for any counseling, psychotherapy, mental health, or any other medical assistance.
- I accept my coach is not a psychotherapist, counselor, psychologist, mental health, or medical care provider. If I believe I have a psychological or medical condition, I advise myself to seek qualified professional care from a licensed psychotherapist, counselor, or appropriate medical care provider to maintain myself as a healthy, responsible person able to engage in coaching.
- I understand that Now Your Life will maintain strict confidentiality with the information shared in coaching.
- I understand my confidential information can be shared with my written consent or if a court judge demands it. I also know if I exhibit signs to harm, abuse, or kill others or even harming myself, my coach is obligated by law to break our confidentiality agreement without my permission.
- I understand that my full and honest participation in life coaching is required and that I am fully responsible for showing up to my scheduled sessions on time.
- I understand and accept that life coaching is a process of personal empowerment.
- I understand and accept that any results or outcomes cannot be guaranteed.

I have carefully read the statement of intent above with complete understanding and agree with all points contained therein:

Client Signature and Date

Final Signature of Recognition and Consent

I, _____, have fully read this new client form and understand all of its contents and commit myself to _____ session(s) for the rate of _____.

Client Signature and Date

Coach Signature and Date

I look forward to working with you!

It's NOW all about YOUR AUTHENTIC YOU!

Now Your Life

Picture Window of Life

Additional Notes, etc.