



Deanna LoTerzo
CERTIFIED LIFE COACH

Hi, I am happy to welcome you as a new client and am excited that you chose me to help you achieve your personal goals.
Please complete the following information and return it via email or bring it to your Discovery Session so we can get started.

Date: _____

Individual Client:

Name: _____

Corporate Client:

Company Name: _____

Title: _____

Home Address:

Address: _____

City: _____

State/Prov: _____ Zip/Postal Code: _____

Business Activity:

Work/Type of Business: _____

Number of Years Employed/ In Business: _____

Role Currently Held & for How Long: _____

Contact Details:

Cell: _____

Business Phone: _____

Home Phone: _____

Work Email: _____

Home Email: _____

Family:

Date of Birth (optional): _____

Spouse/Partner's Name: _____

Children's Names/Ages: _____

Discovery Session Date:

Follow Up Package Scheduling:

Session Day/Time/Frequency: _____

Start Date: _____

Fees and Payment Options:

Package Type: _____ Consult Fees: _____

Interac Date: _____ Square: _____ Pay Pal: _____

Credit Card No : _____

Expiration Date: _____ Card Ref: _____ Date Paid: _____

Disclaimer:

The Client is aware that the coaching relationship does not represent psychological counseling although may include IRT therapy when mutually agreed. The Client is also aware that coaching results can vary and are not guaranteed. The Client agrees that he/she is entering into coaching with the understanding that the Client is solely responsible for his/her own decisions and results. The Client also agrees to hold the Coach free from all liability for any actions or results for adverse situations created as a direct or indirect result of advice given by the Coach.

(Client initials): _____

Session Contact Procedure & Cancellation Policy:

The Client shall contact the Coach at the agreed hour. If the Client fails to make the appointment time, the Client is still responsible for the coaching fee, unless 24 hour notice was given to reschedule the call. The Coach will make every effort to reschedule with the client.

Client Signature

Date:

Coach Signature

Date:

Important Issues:

Please briefly outline core issues you would like to deal with through this process:

Issue #1

Issue #2

Issue #3

Issue #4

Personal Profile:

1. I would describe myself as:

2. Others would describe me as:

3. What are your deepest fears?

4. The three things that I like most about my life/situation are:

5. If I could change three things about my life/situation, they would be:

6. My three greatest accomplishments (so far) are:

7. Some of my hobbies/interests are:

8. The one thing I would like most to accomplish (but haven't yet) is:

9. I think that the most important thing in life is:

10. I am interested in working with a life coach because: