

## Client Initial Assessment Questionnaire

### 1. Personal Information:

- Full Name:
- Age:
- Gender:
- Contact Information (Phone and Email):
- Address:

### 2. Background and Lifestyle:

- Occupation:
- Marital Status:
- Number of Dependents (if any):
- Hobbies and Interests:

### 3. Current Situation:

- What motivated you to seek a life coach?
- Describe any specific challenges or issues you are facing in your life right now.
- Are there any immediate goals or changes you wish to achieve?

### 4. Life Goals and Aspirations:

- What are your long-term goals and aspirations in various areas of life (e.g., career, relationships, health)?
- Are there any dreams or ambitions you have yet to pursue?

### 5. Strengths and Weaknesses:

- What do you believe are your strengths and weaknesses?
- How do you handle setbacks or obstacles?

### 6. Previous Coaching or Counseling Experience:

- Have you worked with a life coach or counselor before? If yes, please briefly describe your experience.

### 7. Health and Well-being:

- Are there any physical or mental health concerns that may affect your coaching experience?
- Do you have any dietary or fitness goals?

**8. Time Commitment:**

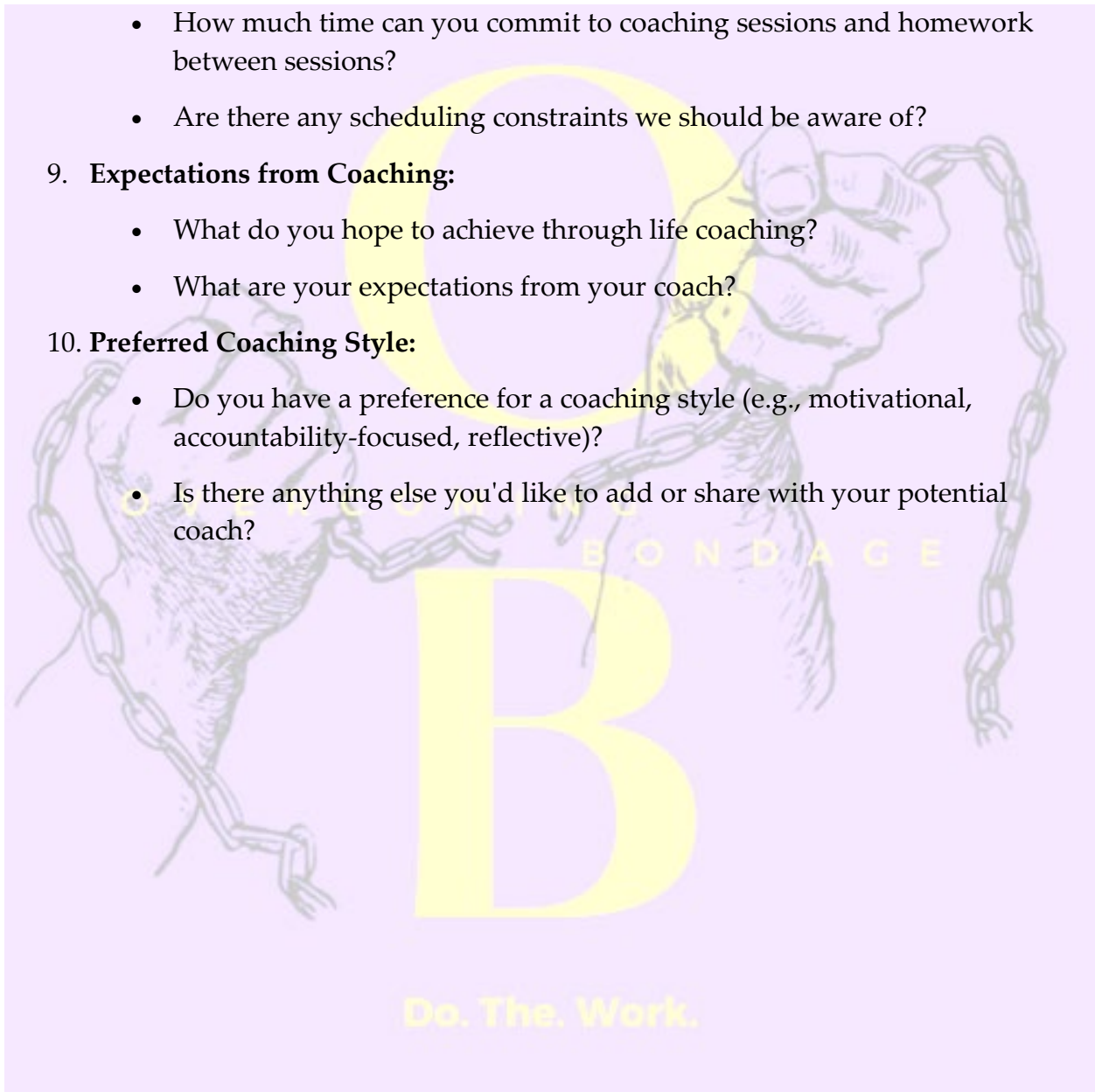
- How much time can you commit to coaching sessions and homework between sessions?
- Are there any scheduling constraints we should be aware of?

**9. Expectations from Coaching:**

- What do you hope to achieve through life coaching?
- What are your expectations from your coach?

**10. Preferred Coaching Style:**

- Do you have a preference for a coaching style (e.g., motivational, accountability-focused, reflective)?
- Is there anything else you'd like to add or share with your potential coach?



I am honored to welcome you as a new client to our coaching program. Your decision to embark on this journey towards personal growth and self-improvement is commendable, and I am eager to assist you in achieving your goals and aspirations.

As a \_\_\_\_\_ you bring a unique perspective to this coaching relationship. I appreciate your request for a formal and unbiased approach. Rest assured that our coaching sessions will be tailored to meet your specific needs and preferences.

Your commitment can undoubtedly enrich our coaching experience. Please know that I am here to support you in both your personal and professional endeavors.

During our coaching journey, we will work together to:

1. **Clarify Your Goals:** We will begin by defining your objectives and aspirations, ensuring that we have a clear understanding of what you wish to achieve.
2. **Develop Strategies:** Together, we will explore strategies and action plans that align with your goals, whether they pertain to your writing career or personal life.
3. **Overcome Challenges:** Should you encounter any obstacles or setbacks, I am here to help you navigate them effectively and develop resilience.
4. **Celebrate Successes:** Every step of progress, no matter how small, is an achievement worth celebrating. We will acknowledge and celebrate your accomplishments along the way.
5. **Continuous Growth:** Our coaching relationship is a partnership focused on your growth and well-being. I am dedicated to your success and will support you in reaching your fullest potential.

To begin our coaching journey, please take a moment to complete the initial assessment questionnaire that was provided earlier. Your responses will serve as a valuable foundation for our first session.

Once again, I extend my warmest welcome to you. I look forward to our collaboration and the positive transformations that await you on this path of self-discovery and personal development.

If you have any questions or require further assistance, please do not hesitate to reach out.

Yours sincerely,

Shaquia Jimson, Owner of Overcoming Bondage LLC

## Client Personal Information Intake Form

*Please complete this form to provide essential personal information. All information shared will be treated with the utmost confidentiality.*

### Client Information:

#### 1. Full Name:

- First Name:
- Middle Name (if any):
- Last Name:

#### 2. Date of Birth:

- XX/XX/XXX

#### 3. Gender:

- Male
- Female

#### 4. Contact Information:

- **Mailing Address:**

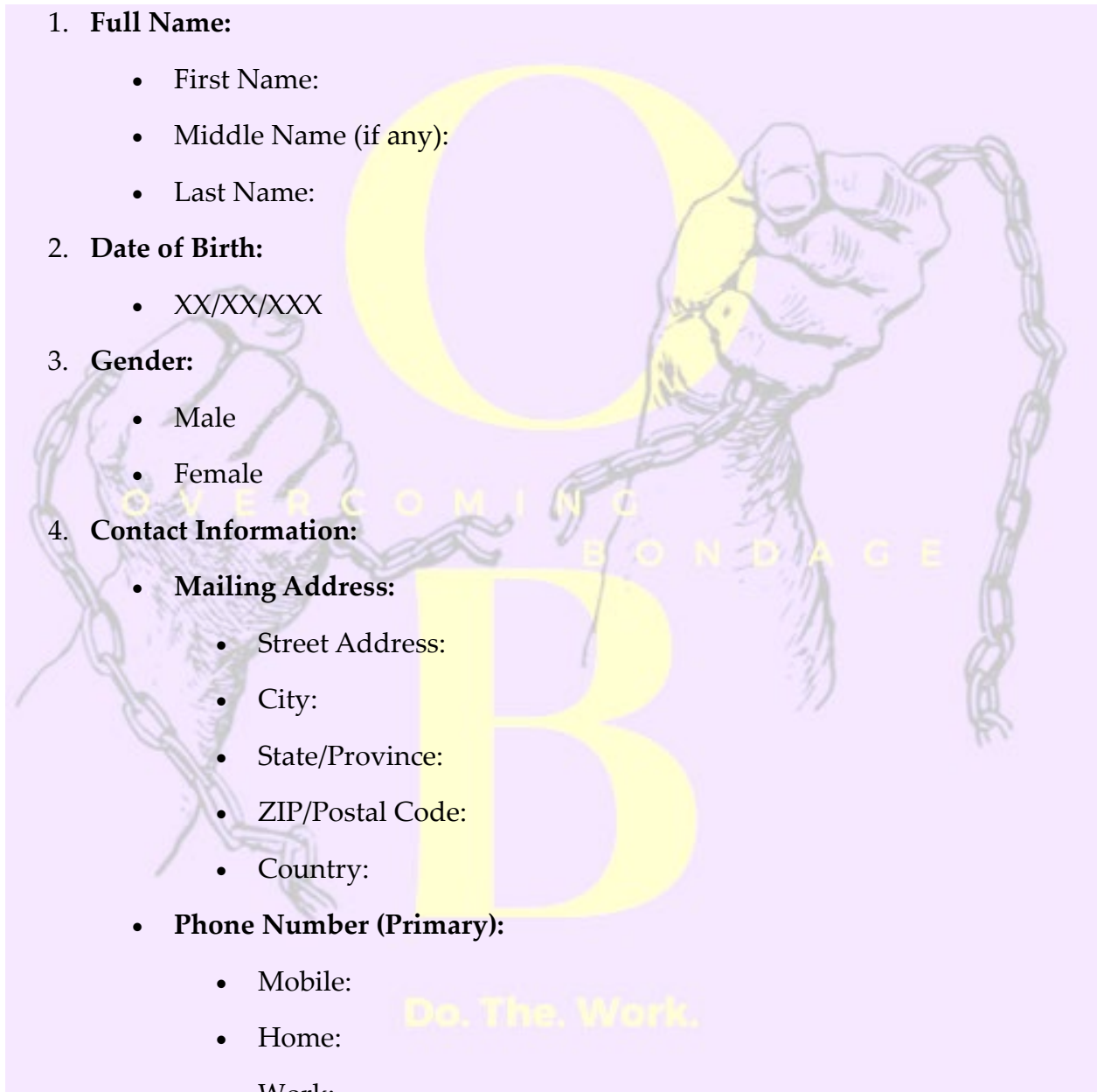
- Street Address:
- City:
- State/Province:
- ZIP/Postal Code:
- Country:

- **Phone Number (Primary):**

- Mobile:
- Home:
- Work:

- **Email Address (Primary):**

- Alternative Email Address (if any):



## Occupational Information:

### 5. Occupation:

- Current Job Title:
- Employer's Name:

### 6. Marital Status:

- Single
- Married
- Divorced
- Widowed
- Other (please specify): \_\_\_\_\_

### 7. Number of Dependents (if any):

## Emergency Contact:

### 8. Emergency Contact Person:

- Name:
- Relationship:
- Phone Number:
- Email Address:

## Hobbies and Interests:

### 9. Please list any hobbies or interests that you enjoy in your free time:

## Additional Information:

### 10. Is there any additional information you would like to share about yourself, your background, or any specific historical context that may be relevant to your goals or coaching?

## Privacy and Consent:

### 11. Consent to Share Information:

- I give consent for my coach to use the provided information for the purpose of coaching.



- I understand that my information will be kept confidential as per the coaching agreement.

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

Date: \_\_\_\_\_



## Invoice Form

*Please complete this invoice form and return it along with your payment. Thank you for your business.*

### Invoice Details:

**1. Invoice Number:**

- 0001J

**2. Invoice Date:**

- \_\_\_\_\_

**3. Due Date:**

- \_\_\_\_\_

### Billing Information:

**4. Bill To:**

- Full Name or Company Name:
- Mailing Address:
- City:
- State/Province:
- ZIP/Postal Code:
- Country:
- Email Address:
- Phone Number:

### Service Details:

**5. Description of Services:**

- Coaching Sessions
- Other (please specify): \_\_\_\_\_

**6. Service Date(s):**

- (You can list multiple dates if applicable)

\_\_\_\_\_

**7. Rate per Session:**

- Amount per Session:

**8. Quantity:**

- Number of Sessions:

**Payment Details:**

**9. Subtotal:**

**10. Total Amount Due:**

- \_\_\_\_\_

**Payment Instructions:**

**12. Payment Method:**

- Credit Card
- Bank Transfer
- Check
- Other (please specify): \_\_\_\_\_

**13. Payment Instructions:**

- [Provide payment instructions, such as bank account details, mailing address for checks, or a link for online payments]

If you have any questions or require further assistance regarding this invoice or any historical context you'd like to discuss, please feel free to contact us.

Thank you for choosing our services.

Sincerely,

**Do. The. Work.**

Shaquia Jimson, Owner of Overcoming Bondage LLC