

# Erin K. Garcia Client Intake Form

## Client Information

Title \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Nickname (if applicable) \_\_\_\_\_

Address \_\_\_\_\_

## Contact Details

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Cell Number \_\_\_\_\_ Fax (if applicable) \_\_\_\_\_

Email(s) \_\_\_\_\_

How may I contact you? Phone  Cell  Email

## Employment Information

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

## Personal Information

Birth date \_\_\_\_\_ Marital Status \_\_\_\_\_ No. of Children \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Spouse's Birth date \_\_\_\_\_

Important Dates in your Life \_\_\_\_\_

\_\_\_\_\_

Names and Ages of Children \_\_\_\_\_

\_\_\_\_\_

## Expectations

What do you expect to get out of these coaching sessions?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tell me something about yourself that you think I should know to coach you better?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Briefly share your overall business and life goals. Where do you see yourself in...

1 Year: \_\_\_\_\_

5 Years: \_\_\_\_\_

10 Years: \_\_\_\_\_

