



# Exhale... it's Just a New Client Form

## CLIENT INFORMATION:

Today's Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**How did you hear about us?** \_\_\_\_\_ Preferred Contact: (circle all that apply)

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Age: \_\_\_\_\_ Phone Email Text

Phone: \_\_\_\_\_ Occupation: \_\_\_\_\_

Email: \_\_\_\_\_

Relationship Status: (circle ones that apply) Single Engaged Divorced Widowed Married

How would you rate your relationship satisfaction? (no satisfaction) 1-10 (very satisfied) \_\_\_\_\_

Previous Therapy or Coaching Experience:

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What helped / What did not help:

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## THINGS YOU WANT YOUR COACH TO KNOW:

What brings you to coaching?

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What would you like your coach to help you accomplish? What tools/Skills/Practices do you want to learn or be better at?

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What are some of your strengths?

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What areas do you want to improve?

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List your most life-defining moments:

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What is your religious orientation, if any? Describe where you are on your spiritual journey.

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Symptom Check List (circle all that apply)

Physical Discomfort	Anxiety	Depression	Worthless	Difficulty sleeping	Change in Weight	
Stress	Panic attacks	Relationship stress	Work stress	Difficulty concentrating	Defensive	
Resistant	Worry a lot	Hurry around	Low Self-Esteem	Irritable	Anger	Mood swings
Control Issues	Guilt	Social anxiety	Grief	Fatigue	Isolative	Judgmental
Argumentative	Sadness	Addicted	Difficulty Sleeping	Isolative	Feeling Stuck	

If not listed, please describe symptoms or elaborate here:

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How do you take care of yourself (self-care routine/leisure activities)? How do you have fun?

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In a few words, How would others describe you:

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In a few words, How do you see yourself: \_\_\_\_\_

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Where do you find joy? \_\_\_\_\_

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What are you grateful for? \_\_\_\_\_

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Level of Current Motivation: \_\_\_\_\_ (no motivation)1-10 (very motivated)

Internally Motivated \_\_\_\_\_

Externally Motivated \_\_\_\_\_

(no motivation)1-10 (very motivated)

(no motivation)1-10 (very motivated)

LIFE COACHING INFORMATION AND CONSENT TO COACH:

- A. Living the Exhale is a Mindful Living Coaching company, that helps clients develop their highest selves, accomplish their goals, and remove any blockages that may get in the way. Although Danielle Shields, MA has clinical training and is receiving clinical supervision towards licensure, Danielle Shields, MA is not qualified to offer Licensed therapy at this time. If mental health services beyond the scope of life coaching are required, clients will be referred.
- B. Clients Rights and Responsibilities: You must advocate for yourself. Therapy is not a passive service, in that it requires your active involvement and effort to change thoughts, feelings, and behaviors. You will be expected to practice and incorporate goals and homework in between sessions. There is no instant, painless cures, and no magic pills. However, healing can happen rapidly when ready.
- C. Treatment: As a holistic professional, I utilize a variety of modalities. You have the right to ask us about modalities used in session and alternatives. If you could benefit from any treatment that I cannot provide, I have an ethical obligation to refer you to someone who can help you. If coaching does not seem to be making progress, I cannot ethically continue working with you and will refer to you to another professional.
- D. Financial Policy: Payments are expected at the time of service. Cash, check or credit cards are acceptable payments. Sliding Scale is offered to clients that meet low income requirements.
- E. Book Policy: Part of Living the Exhale's unique coaching approach, is offering Danielle Shields' library of self-help books to clients for their use. Clients are asked to sign their name on the checkout card and return the book when finished.
- F. Appointments and Cancellation Policy: If the client must reschedule an appointment, they should do so at least 24 hours in advance so that the life coach may reschedule their time and give others the opportunity to fill the vacated time slot.
- G. Confidentiality Commitment: All information disclosed to your life coach will be kept in strict confidence. Personal testimonies and assessments taken, given or shared will not be transferred to anyone else except when the information signs for release. Persons receiving life coaching can expect confidentiality to be limited in the following situations: 1. When the personal safety of the client or another person is in issue. 2. When any form of child or vulnerable persons' abuse is disclosed or suspected 3. Court mandated.
- H. Privacy Statement: It is important to know that communication via, skype, facetime, email, text and phone may not be secure and Living the Exhale/Danielle Shields, MA cannot guarantee your privacy over these means. Only minimal client information will be disclosed via the above means of communication.

By my Signature, I affirm that I have read and do understand the above statements:

\_\_\_\_\_  
Coaching Client's Name (please print)

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client's Parent or Guardian if under 18 (please print)

\_\_\_\_\_  
Client's Parent or Guardian Signature

\_\_\_\_\_  
Date