

NEW COACHING CLIENT FORMS PACKET

Please save this file to your desktop before continuing. Any changes made to the enclosed forms will be lost if you do not save this file to your computer first. Once you have saved this form, fill in the information where requested. Please note that information that does not appear on your screen in the form field will not print. You are limited to the size of the box. Additional information may be sent separately. Completed forms must be printed out, signed and dated, and faxed to 866-487-2324, and must be received prior to the first scheduled coaching session.

Enclosed:

- New Coaching Client Welcome and Agreement - Print, sign, and fax
- Client Intake - Fill in form, print, and fax
- Statement of Intent - Print, sign, and fax
- Release of Relevant Treatment Information - Fill in form, print, sign, and fax
- Confidentiality Agreement - For your records

NEW COACHING CLIENT WELCOME & AGREEMENT

Each new client to my practice is a welcome addition. We have had our introductory call with each other and determined that we are optimistic and enthusiastic about what we can accomplish together. To bring our “best selves” to the coaching relationship, it is important that we share the same understanding about how we will work together.

Basic Shared Agreements:

- I recommend a 3-month commitment to bi-weekly sessions (total of 6 sessions). A 3-month commitment ensures that you understand that it is hard work to change habits of thinking and acting, and that you are committed to making a concentrated effort and understand that it takes time.
- Coaching Packages or Individual Sessions will be billed prior to the first session via Paypal and payment needs to be received in order to begin our coaching relationship.
- Each session is 1 hour long and takes place by phone.
- I will bring myself to those coaching sessions free from distractions and respectfully request that you do the same. A coaching session in a public venue with distractions and background noise is not efficient.
- We agree that we will each show up at the mutually scheduled time for our coaching session and if you have to reschedule you will do so with a minimum of 48 hours notice. I certainly understand that emergencies do arise and will accommodate those on a case-by-case basis.
- Should you “no-show” for two appointments during our coaching relationship (without notification or rescheduling) we will evaluate whether or not coaching is appropriate for you right now.
- If you’ve purchased a package and find yourself unable to use your sessions for any reason, you may put the remaining sessions on a 3-month hold. Session credits will not be carried out further than 3-months. Coaching fees are non-refundable should you decide to “quit” the process, as our complimentary session is designed to remove the possibility that we would not be a good fit for each other.

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- I welcome communication between our calls via email (sbi.gretchen@me.com). It is my expectation that you will reach out if you hit a “sticky” spot that you would like some feedback on, and that you will share the successes that you have on the way to creating your desired future. If you need an “emergency call” I can usually accommodate within the same week and I do not bill for calls that are 10 minutes or less.
- I welcome your input and questions along the way. Our relationship is a collaborative one, and the more you put into it the more you will get out of it. Ask me questions, challenge my point of view, bring resources to the table that you’ve found, tell me where I’m wrong, and share with me your insights along the way. You are your own best expert even if you don’t know that yet (you will shortly!).

I will call my coach at the scheduled time (301-624-5746). I understand that I am responsible for any long-distance charges. I have read and agree to the working agreements above, and will honor them during our coaching relationship.

Client (Print/Sign)

Date

CLIENT INTAKE

Welcome! I am excited to be embarking on this journey with you, and look forward to getting to know you better over the coming months. It would be helpful to me if you would complete the following basic information and email it back to me before our first session. Save this form to your desktop **before beginning to fill it out**, or changes will be lost.

Name:			
Street Address:			
City/State:			
Country:		Zip or Postal code:	

Email of Choice:	
Phone of Choice:	
Fax:	

Name of Employer and Position:	
Name of Spouse/ Significant Other:	
Name and Ages of Children:	
What is the most important thing that I should know about you right now:	

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STATEMENT OF INTENT

All coaching services delivered by Gretchen Pisano, utilizing principles, methods and tools of the Martha Beck Coaching System, are meant to challenge, uplift, and support you psychologically. However, coaching is not psychotherapy. If you feel psychologically stressed to the point that it is interfering with your ability to function, please have the courage to seek the help you need in the form of a professional counselor. Life coaching may augment your therapy, but the work of coaching is meant to be done when major emotional and psychological wounds are already healing or healed. In that spirit, please read the following and sign below should you agree to each statement and wish to proceed:

- I understand that the life coaching services I will be receiving from Gretchen Pisano are not offered as a substitute for mental health care. I also understand that my coach, Gretchen Pisano, is not acting as a psychotherapist, and does not purport to offer mental health care.
- I understand that my coach will maintain the confidentiality of our communications only to the extent defined by the laws of the states in which each of us resides.
- I understand and agree that I am fully responsible for my well being during my coaching calls, and subsequently, including my choices and decisions.
- I understand that all comments and ideas offered by my coach are solely for the purpose of aiding me in achieving my defined goals. I have the ability to give my informed consent, and hereby give such consent to my coach to assist me in achieving such goals.
- I hereby release, waive, acquit and forever discharge Gretchen Pisano and Sounding Board Ink, LLC, their agents, successors, assigns, personal representatives, executors, heirs and employees (collectively "Sounding Board Ink" or "SBI") from every claim, suit action, demand or right to compensation for damages I may claim to have or that I may have arising out of actions, omissions, or commissions taken by myself or by SBI as a result of the advice given by SBI or otherwise resulting from the coaching relationship contemplated hereunder. I further declare and represent that no promise, inducement or agreement not herein expressed has been made to me to enter into this release. The release made pursuant to this paragraph shall bind my heirs, executors, personal representatives, successors, assigns, and agents.

I have read the statements above and I understand and agree with the points contained therein:

Client Signature and Date

RELEASE OF RELEVANT TREATMENT INFORMATION

In context of my coaching relationship with Gretchen Pisano of Sounding Board Ink, LLC, I authorize her to contact other health care professionals that I am currently working with as it pertains to our coaching relationship.

I am currently in treatment/consulting with the following individuals (e.g., psychotherapist, nutritionist, homeopathic practitioner, psycho-pharmacologist, or any other medical professional):

Name	Contact Information
I am currently on medication (type):	
In the past I have been on the following medications (types/duration/date of disuse):	

If I am working with a psychotherapist (which I have disclosed above), my practitioner knows that I am working with Gretchen Pisano and that our work is not therapeutically based. I understand, and agree, that Gretchen Pisano does not represent herself as anything other than a trained coach.

Agree: _____ (please initial) Not Applicable _____ (please initial)

I understand, that in keeping with the requirements of coach credentialing by the International Coach Federation (www.coachfederation.org) Sounding Board Ink, LLC will be keeping a confidential record of my name, phone number and email address. This information will be used exclusively for the purposes of meeting those requirements, and following the credentialing process where two assessors will validate my list and subsequently destroy the two copies, only the master list will be maintained within secure files of the ICF.

I, _____, am fully disclosing this information and am not withholding information that is pertinent to my care.

Signature _____ Date _____

CONFIDENTIALITY AGREEMENT

The conversations that we have within our coaching sessions are confidential and will be protected as such. Information will be shared outside of our sessions only with your written consent or in the event that a Court Judge demands it, however, the following are instances where I would be obligated by law to break our confidentiality agreement without your permission:

- If it is assessed during your participation in coaching sessions that abuse or neglect of children or elders is occurring.
- If in my presence you threaten to kill or harm another individual, and I am convinced that you will act on this threat, or that you may lose control of your actions.
- If at any time during the course of our sessions, I determine that you are a danger to yourself, I will inform you of that opinion and make every effort to keep you from endangering your life. In some cases this may include notifying the police or family members.



Master Certified Coach
Sounding Board Ink, LLC