



New Client Packet

Welcome! I'm so glad that we're working together. Completing this new client packet is the first step in our work. Please answer all questions below and then save this pdf and return it to me @ **contact@theadhdclaritycoach.com**. The following forms are included in this packet:

1. Client Information
2. New Client Questions
3. Client/Coach Agreement

Client Information

Name:

Date of Birth:

Email:

Address:

Phone Number:

Occupation/ Employer:

Client Questions

1. What do you hope to achieve by working with a coach?

2. Are there factors that might get in the way of you achieving these outcomes?

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3. Who is with you on the journey? Who do you take care of and who takes care of you?

4. What are you proud of (past and present)?

5. What does success mean to you and how have you experienced it?



6. What are some things that bring you joy?

7. What can you expect of me as your coach? What can I expect of you?

8. What kind of accountability is helpful to you? What is not helpful?

9. Is there any information that you would like me to know about your identity and/ or life experiences (cultural, gender, professional, religious, etc.) that will help me understand you and your background?

10. What will your life look like, feel like, or sound like when we're finished working together?

Anything else that you'd like me to know before we get started?



Client/ Coach Agreement

Thank you for this opportunity, I'm honored to be your coach and look forward to working with you! Coaching is considered a "co-creative" process, that means we both have an active role in the work. This document includes important information about what you can expect in our coaching sessions and our respective roles.

Your Role:

Each week you will bring an agenda to our session. This is a topic that you would like us to explore and what you want to take away from our session. Feel free to send it to me ahead of time by email or text. Please be on time for our sessions. Your coaching time is reserved just for you so I won't start other projects or multitask during that time. I have commitments to other clients throughout my day, so I'm not able to guarantee that I can extend our time if we start late.

Your honest feedback about your coaching experience helps me tailor my coaching for you. Please let me know what is working for you as well as what is not working. I'm more interested in offering you the right support than in "being right"!

My Role:

I will listen closely to you, respond to what I hear, and ask questions. I will offer objective and non-judgmental feedback based on what I observe in our sessions.

At the end of the session, if you don't mention what actions you would like to take, I'll suggest some ideas. I often ask clients to stretch themselves and commit to concrete ways they will move towards their goals each week. If one of those suggestions is not the right next step for you, I encourage you to let me know and offer something different.

Part of my role as a coach is to be an accountability partner for you. I encourage you to communicate with me about what you want that to look like. Every client is different, so there is no one way that I offer this support. I offer unlimited text and email support to all of my clients and will respond to both within my business hours.

I will honor your confidentiality and the information that we discuss will always be held confidential unless I have your consent/request to share it with another.

I am not a psychotherapist and am not trained to offer psychological interventions. If you need services that are not within my scope, I will refer you to an appropriate professional.



Ways to Get More Out of Coaching:

Come with a clear understanding of what you would like to take away from the session. It's fine if you need to change this because of something we discover during our coaching session, but coming with your agenda in mind will help you get the most out of our sessions.

Stay curious with yourself. We all have behaviors or tendencies that can frustrate us and prevent us from meeting our goals. Coaching is meant to help with this. The coaching process can help you clarify what you want, what is getting in your way, and how to meet your goals. A kind and curious approach towards yourself often helps with that.

Take advantage of the accountability options I offer.

Be open-minded. Try new approaches. Experiment.

Be willing to change your beliefs and patterns if they don't serve you anymore.

Offer me honest feedback throughout our coaching relationship about what you need.

Payment:

I offer different packages and fees depending on the length of commitment. For my month to month services (4 sessions a month), fees are charged monthly and are paid as a retainer fee at the beginning of each month. Pre-paid packages are paid in full before we begin our sessions (payment plans can be arranged as needed). My current fees are listed on my website.

Month to month rates are subject to change and you will be notified in advance of any rate changes.

All of my individual coaching services include unlimited text and email support between sessions.

I require clients to be current on payments before our sessions, so please pay invoices before the first session of the month.

Scheduled Calls:

I can be reached at 770-744-7561 for our scheduled sessions.

I prefer audio calls (rather than video) since it helps me focus and allows my clients to process/ think without distraction. If you prefer a different format, I'm happy to work with you and use a modality that best fits your needs.



Please give our call high priority and arrange your schedule to honor our time. If you must reschedule our call, I ask you to give me 24-hour notice.
No call/no shows and appointments canceled less than 24 hours in advance are charged at the same rate as a regular session and will not be rescheduled.

Client Signature:

Date:

Coach Signature:

Date: