

**LIFE QUEST COACHING ASSOCIATION**  
A DIVISION OF CCCO, INC.

SERENA HOWELL, Life Coach  
P.O. Box 1589 Sherwood, Oregon 97140  
503-341-2280

**CLIENT POLICIES & PROCEDURES**

**Welcome!** I look forward to working together with you. Before we begin our coaching sessions together, there are a few guidelines that I expect clients to maintain in order for our relationship to work best for you. If you have any questions, please call me.

- Fee** I charge \$50.00 per fifty minute session. There will be extra charges for materials we may need. Clients pay me at the time of the session by check or cash unless prior arrangements have been made or we have a tele-session. **In this case, the session needs to be paid by mail to the above address prior to the tele-session.**
- Procedure** **My clients come to their appointment on time or call on time.** They discuss updates, progress they've made and are ready to be coached. The agenda of each coaching session is client generated and coach supported. If requested, I will e-mail or fax the client a prep form that that they can complete and send/or fax prior to the session. My e-mail address is [Serena@LQCA.org](mailto:Serena@LQCA.org).
- Changes** **My clients give me 24 hours notice if they have to cancel or reschedule a session.** If you have an emergency, we will work around it. If notice is not given by client, client will be responsible to pay for the session or be required to reschedule within the week they have canceled.
- Extra Time** **You may call between sessions if you need "spot-coaching", have a problem, or can't wait to share a win with me.** (You can also fax or e-mail me). I enjoy delivering this extra level of service. However, you may not hear back from me until our next session, unless you specifically ask for a call back. In this case, I will charge for the conversation if it is over 15 minutes.
- Problems** **I want you to be satisfied with our coaching relationship.** If I ever say or do something that upsets you or doesn't seem right, please bring it up. I will do what is necessary to make it right.
- Results** **It is necessary for the client to implement the action/goals/field work** discussed in order to feel that coaching is a success. You have hired a coach to do things differently than you ever have before. If you choose not to use what you have discussed during the coaching session and keep doing what you have always done, you will get the results you have always gotten.

I have read the above Client Policies and Procedures and agree to follow them. I desire for my coaching experience to be successful.

Client: \_\_\_\_\_

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

Coach: \_\_\_\_\_

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

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**LIFE COACHING AGREEMENT**

*To Client: Please review, adjust, sign where indicated,  
and return to me at your first session or by mail to the above address.*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Cell: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Initial term: \_\_\_\_\_ months, from \_\_\_\_\_ through \_\_\_\_\_

Fee: \$ \_\_\_\_\_ per session  
\$ \_\_\_\_\_ per month  
\$ \_\_\_\_\_ for the project

Session date: \_\_\_\_\_ Session time: \_\_\_\_\_

Number of Sessions per month: \_\_\_\_\_

Duration: \_\_\_\_\_ (Length of scheduled session)

Referred by: \_\_\_\_\_

- Ground Rules:**
1. Client arrives or calls the coach at the scheduled time.
  2. Client pays coaching fees in advance.
  3. Client pays for long-distance calls, if incurred.

1. As a client, I understand and agree that I am fully responsible for my well-being during my coaching calls, including my choices and decision. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referrals will be given if needed.
2. I understand that "life coaching" is a relationship I have with my coach that is designed to facilitate the creation/development of personal, professional or business goals and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationship, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.

4. I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that life coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of therapy.
5. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.
6. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.
7. I understand that certain topics may be anonymously shared with other life-coaching professionals for training OR consultation purposes.
8. I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual or other matters. I understand that all decision in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

**I have read and agree to the above.**

**Client signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**CLIENT DATA FORM**

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

Name: \_\_\_\_\_

Occupation: \_\_\_\_\_ Business Name: \_\_\_\_\_

Home address: \_\_\_\_\_ Preferred address

Business address: \_\_\_\_\_ Preferred address

Day Phone: \_\_\_\_\_ Preferred phone \_\_\_ Please do not call

Evening Phone: \_\_\_\_\_ Preferred phone \_\_\_ Please do not call

Cell Phone: \_\_\_\_\_ Preferred phone \_\_\_ Please do not call

Fax Number: \_\_\_\_\_ E-mail address: \_\_\_\_\_

Preferred means of communication: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_ Religious Pref.: \_\_\_\_\_

Names of important people in your life (spouse, partner, children, friends, etc.):

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Emergency Contact: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Other Information you want me to know:

Have you ever been coached before? If so, please describe the experience:

What made you hire a life coach?

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Do you have specific goals for this coaching experience? If so, please state:

If not, what goal might you now create?

What about your life really excites you?

What would your "Ideal" life look like?

What do you most want for your self (dreams) or others?

What dreams have you given up on?

What is your professional/business mission?

What parts of your life are you most please and proud of having accomplished?

What do you deeply value? (characteristics, etc.)

In what way do you honor these values?

What obstacles stop you from having the life you want to have?

What do you believe your talents are?

What is your life purpose? (What significant difference have you made in the world?)

Where do you get your energy, inspiration, motivation? What drains your energy?

What things are you now willing to do or change?

What attitudes or beliefs held by you currently limit you?

What attitudes or beliefs held by others currently limit you?

Who has been the most influential person in your life?

Explain why:

What have you hired me to do/be for you?

What are five things you can do immediately that will move you to where you want to be?

How might you sabotage yourself in this coaching relationship?

What vision or goal is important enough for you to make radical changes in how you operate right now?

How will you and I know how successful our coaching has been?

What opportunities are currently available to you right now that you wish to make the most of?

What currently consumes your time that doesn't serve your life vision or core values?

What are you currently struggling with that you would like to do with less effort?

What aspects of your life are you controlling and what aspects are controlling you?

**Please list any assessment tools you have taken:**

**“The goal of coaching is not in fixing what is broken, but in discovering new talents and new ways to use old talents that lead to far greater life effectiveness.”**

**- Elizabeth and Gifford Pinchot**