

Life Coaching Intake Form

Let's start your life coaching journey with a summary of your core values, your aspirations, and your current life situation. We will discuss your answers to these questions as we set goals and choose coaching strategies.

Personal Vision and Values



What are three words or phrases that best describe your core values or principles in life?



When you imagine your ideal life five years from now, what does it look like and how do you feel?

Life Coaching Intake Form

Personal Development Goals

☐

What specific areas of personal growth or self-improvement do you want to focus on during our coaching sessions?

☐

Can you describe a situation where you felt particularly proud of how you responded or behaved? What skills or qualities did you demonstrate then?

On a scale of 1-10, how would you rate your current level of self-confidence? What would it take for you to rate it a perfect 10?

1 2 3 4 5 6 7 8 9 10

☐

In which areas of communication do you feel most confident, and where do you believe there's room for improvement?

Life Coaching Intake Form

Key Life Transitions or Changes

☐

Have there been any major life changes or transitions you've recently experienced or expect to experience in the near future? If so, please describe.

☐

How do you usually cope with or navigate significant changes in your life?

☐

If you're undergoing a significant change (like a relocation or divorce), what are your top concerns or fears about this transition?

☐

How can our coaching sessions best support you during this transitional phase?

Health & Wellness Coaching Intake Form

Let's start your coaching journey with an exploration of your goals, habits, and history. We will discuss your answers to these questions as we partner to achieve your ideal wellness.

Health Goals

What are the top three health goals you'd like to achieve in the next six months to a year?

On a scale of 1-10, how motivated do you feel about achieving these goals? What might boost this motivation further?

1 2 3 4 5 6 7 8 9 10

Have you tried to achieve these health goals in the past? If so, what challenges or barriers did you encounter?

Health & Wellness Coaching Intake Form

Medical History

☐

Please list any medical conditions, past or present, that you believe we should be aware of during our coaching sessions.

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Are you currently taking any medications or supplements? What are they?

☐

Have you had any surgeries or significant medical treatments in the past five years? If yes, please provide brief details.

Health & Wellness Coaching Intake Form

Lifestyle Habits

☐

How would you describe your current dietary habits? Are there any specific dietary patterns or restrictions you follow?

☐

How often do you engage in physical exercise in a typical week? Can you briefly describe the type of activities you participate in?

☐

On average, how many hours of sleep do you get per night? Do you believe you have a regular sleep pattern?

☐

How would you describe your current level of daily stress? What are some common sources or triggers for this stress?

Academic Coaching Intake Form

Let's start your academic coaching journey with an exploration of your aspirations, challenges, and preferences. We will discuss your answers to these questions as we partner to select goals and strategies.

Academic Aspirations and Long-Term Goals



What are your primary academic goals for this year? Are there particular universities or courses you are aiming to get into?



Which subjects or areas of study are you most passionate about, and why?



Five years from now, where do you see yourself in terms of education and career?

Academic Coaching Intake Form

Current Study Habits and Challenges



Describe your typical study routine. How many hours do you study each day, and do you have any set routines or patterns?



Which subjects or topics do you find most challenging, and why?



Do you often procrastinate when it comes to studying? If so, what usually distracts you or holds you back?



How do you currently manage your time, especially when juggling multiple assignments or preparing for exams?



Have you identified any specific academic skills (like essay writing, note-taking, or test-taking strategies) you wish to improve?

Academic Coaching Intake Form

Preferred Learning Style



Which learning format do you find most effective: listening (auditory), seeing (visual), or doing (kinesthetic/tactile)?



Do you often use visual aids (like charts, diagrams, or flashcards) when studying? If not, would you be open to trying them?



When faced with a challenging topic, how do you prefer to tackle it (e.g., discussing with peers, reading multiple sources, watching videos, hands-on practice)?

Business Coaching Intake Form

Please provide a detailed view of your business and its operational nuances. We will discuss your answers to these questions as we partner to address challenges and capitalize on opportunities.

Business Objectives and Vision



Where do you envision your business in the next 3-5 years? What are the key milestones you hope to achieve along the way?



How would you describe your company's mission and core values? Are they well-integrated into your daily operations?



What are the top three objectives you want to achieve in the coming year, and what hurdles do you anticipate in achieving them?

Business Coaching Intake Form

Current Business Challenges

☐

What are the most pressing challenges your business currently faces?

☐

How do you currently address cash flow or financial challenges, if any?

☐

Describe a recent conflict or challenge within your team. How was it managed, and what was the outcome?

☐

Are there specific areas or departments within your business that you believe require immediate attention or improvement?

Business Coaching Intake Form

Team Dynamics and Leadership Style

☐ How would you describe the current dynamics within your team? Are there any evident strengths or weaknesses?

☐ What leadership style do you predominantly use? How do you believe your team perceives your leadership approach?

☐ Are there specific leadership skills or competencies you want to enhance or develop further?

Career Coaching Intake Form

Please provide a snapshot of your professional life thus far. We will discuss your answers to these questions as we partner to navigate your career path.

Career Aspirations and Long-Term Goals



Where do you envision yourself professionally in the next 3-5 years?



Which roles or positions are you currently targeting, and what attracts you to them?



Are there specific industries or companies you aspire to work in? If so, which ones and why?

Career Coaching Intake Form

Current Job Role and Responsibilities



Can you describe your current job role, including your primary responsibilities and tasks?



What aspects of your current job do you find most rewarding, and which are most challenging?



Are there any recent accomplishments or projects in your current role that you're particularly proud of?

Career Coaching Intake Form

Skill Set and Areas for Development

List down the skills you believe are your strongest assets in your current role or career path.



Are there specific skills or competencies you feel you need to develop or enhance to achieve your career aspirations?



How do you currently handle feedback or criticism in your professional life, and are there aspects of it you'd like to improve?



Have you recently attended any training or workshops? Are there any you're considering to further enhance your skill set?



How well do you feel you manage work-life balance, and are there areas related to it you'd like to focus on?

Executive Coaching Intake Form

Please provide a broad overview of your leadership style and challenges related to it. We will discuss your answers to these questions as we partner for success in all facets of your executive role: personal, professional, and organizational.

Leadership Vision and Challenges



How do you envision your ideal leadership style, and what impact would you like to have on your organization in the next 2-5 years?



What are the most significant challenges you currently face in your leadership role?



Can you recall a recent decision or scenario where you felt uncertain or conflicted? How did you navigate it?

Executive Coaching Intake Form

Feedback from Peers and Subordinates

☐ Have you recently received feedback from your peers, team members, or other stakeholders? If so, what were the main takeaways?

☐ How open are you to receiving constructive criticism, and how do you typically respond to it?

☐ Are there specific areas or themes of feedback that have been consistently mentioned by different individuals?

Executive Coaching Intake Form

Leadership Style and Desired Evolution



How would you describe your current leadership style (e.g., democratic, autocratic, transformational, etc.)?



What strengths do you believe you bring to your leadership role?



Are there aspects of your leadership approach that you feel need refinement or change? If so, what are they?



How do you currently handle conflict or disagreements within your team or organization?



Considering the rapidly changing business landscape, are there new leadership competencies or skills you believe you need to acquire or strengthen?

Financial Coaching Intake Form

Please provide a snapshot of your financial situation, habits, challenges, and aspirations. We will discuss your answers to these questions as we partner for your financial security.

Financial Goals and Aspirations

What are your primary financial goals for the next 1-5 years? Are there milestones such as purchasing a home, traveling, or funding a child’s education that you’re aiming for?

Where do you envision yourself financially in the next 10-20 years, and what are your retirement aspirations?

Have you previously set financial goals that you didn’t achieve? If so, what do you believe held you back?

Financial Coaching Intake Form

Current Financial Situation



Can you provide a rough breakdown of your monthly income, expenses, and any recurring financial obligations?



Do you currently have any outstanding debts (e.g., credit card debt, loans)? If so, can you specify their types and amounts?



What savings or investments do you currently have? Are there any specific financial instruments or platforms you use for these?

Financial Coaching Intake Form

Financial Behaviors and Challenges



How would you describe your spending habits? Do you consider yourself an impulsive spender, a saver, or somewhere in between?



Have you ever faced challenges managing or investing your money? If so, can you provide some examples?



Do you currently have a budget or financial plan in place? If yes, how consistently do you stick to it?



How confident are you in making major financial decisions, such as investing in stocks or purchasing real estate? Are there areas where you feel you need more knowledge or guidance?