



**TAMARA RAMIREZ**  
MASF, BSN, RN, SD

# Client Intake Form

## Client Information and Consent

Name

DOB

Occupation

Address

City

Zip

Phone

Email

Emergency  
Contact

Phone

Enneagram  
Type

Are you seeking Spiritual Direction, Mentoring or Coaching?

### GET TO KNOW YOU

1. What would you like me to know about you? Anything in your background or history you think will be helpful for me to know.

2. Three words to describe you?



3. What would you like me to know about your faith background, current religious or faith affiliation, or faith story

4. What motivates you?

5. What habits, activities or thoughts do you desire to release or see grow?

6. In our sessions together, my goal is to support and empower you to experiencing a flourishing life. Please fill out the following scale to help us assess your current state of wellbeing and determine the most important areas to work on. Rate each area from 1 – 10 using # 1 as the lowest level of satisfaction and # 10 as the highest level of satisfaction.

- \_\_\_\_\_ Career
- \_\_\_\_\_ Family
- \_\_\_\_\_ Friends
- \_\_\_\_\_ Physical Health
- \_\_\_\_\_ Physical Environment
- \_\_\_\_\_ Finances
- \_\_\_\_\_ Spirituality/Religion
- \_\_\_\_\_ Personal Growth
- \_\_\_\_\_ Fun and Leisure
- \_\_\_\_\_ Lifestyle
- \_\_\_\_\_ Balance in Life





6. Do you have a life purpose or mission statement? What is your WHY?

7. What barriers do you encounter when seeking to live out our life purpose?

8. Is there anything I need to know about your medical or mental health needs?

What are you goals (for coaching) and greatest desires (for spiritual direction)

1.

4.

2.

5.

3.

6.





## Coaching Client Agreement

### *I Understand:*

- The coaching relationship is designed to help me develop short and long-term goals, and strategies to achieve those goals.
- Coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation.
- The decisions I make and actions I take as a result of the coaching relationship are my sole and exclusive responsibility.
- Coaching is not to be used as a substitute for professional advice by legal, medical, financial, business, counseling, spiritual or other qualified professionals.
- My coaching conversations are confidential, unless I give permission otherwise I am in danger or experiencing a health risk.
- For coach credentialing purposes only, my name and contact information may be given to the International Coach Federation and other qualified certifying organizations.
- Coaching will be conducted in person, by telephone, or by electronic means. I will be responsible to keep my appointments and initiate contact with my coach at my appointment time. Should an appointment need to be changed by either coach or client, at least 24 hours notice will be given.
- I agree to pay for coaching services according to the current fee schedule. Payment must be received in advance of coaching services.
- This coaching relationship may be terminated at any time by either client or coach.

Signature

Date





## Spiritual Direction Client Agreement

*I Understand:*

- I set my goals and expectations for spiritual direction.
- Spiritual Direction is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation.
- Spiritual Direction is not to be used as a substitute for professional advice by legal, medical, financial, business, counseling, or other qualified professionals.
- My Spiritual Direction conversations are confidential unless I give permission otherwise or I am in danger or experiencing a health risk.
- Spiritual Direction will be conducted in person, by telephone, or by electronic means. I will be responsible for keeping my appointments and initiating contact with my spiritual director at my appointment time. Should an appointment need to be changed by either the Spiritual Director or the client, at least 24 hours' notice will be given.
- Our Spiritual Direction relationship may be terminated at any time by either client or coach.

Signature

Date

