Contact Information

Today’s Date:

Full names:

Address:

Phone:

Email:

Personal information

Dates of birth:

Emergency contact number:

**History**

Family members:

Medical issues:

Trauma:

Addictions:

Medications:

Previous therapy/coaching?

Other:

Primary Reason(s) for you visit?

**Wheel of Life**



**Values**

|  |  |  |
| --- | --- | --- |
| AuthenticityAchievementAdventureAuthorityAutonomyBalanceBeautyBoldnessCompassionChallengeCitizenshipCommunityCompetencyContributionCreativityCuriosityDeterminationFairnessFaithFameFriendshipsFunGrowthHappiness | HonestyHumorInfluenceInner HarmonyJusticeKindnessKnowledgeLeadershipLearningLoveLoyaltyMeaningful WorkOpennessOptimismPeacePleasurePoisePopularityRecognitionReligion | ReputationRespectResponsibilitySecuritySelf-RespectServiceSpiritualityStabilitySuccessStatusTrustworthinessWealthWisdom |

1. Circle the top 5 values in your life that resonate with you.
2. Rank your values 1-5: How well is the value reflected in your life now?

1.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Needs work Somewhat Lived Fully

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Needs work Somewhat Lived Fully

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Needs work Somewhat Lived Fully

4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Needs work Somewhat Lived Fully

5.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Needs work Somewhat Lived Fully

**Primary Focus**

*Please identify one area of interest that you want to focus on with me as your coach.*

Example:

**Get a promotion**

“I would like to develop positive work-related skills that show my employer that I'm valuable and worth promoting. I would like to accomplish this over the next three months.”

**Goals and Commitments**

A goal is a specific activity or process you want to complete which is measurable i.e. “I will lose 10 pounds in 2 months” “I want to earn $10,000 more this year”. A commitment is a quality of life shift i.e. “I am committed to eating better and getting fit” “I am committed to earning more money this year”.

  **Commitment Goals**

|  |  |  |  |
| --- | --- | --- | --- |
| Health | 1 | I want to lose more weight | Lose 10 pd in 2 months |
|  | 2 |  |  |
| Money | 1 |  |  |
|  | 2 |  |  |
| Friends and Family | 1 |  |  |
|  | 2 |  |  |
| Relationship | 1 |  |  |
|  | 2 |  |  |
| Personal Growth | 1 |  |  |
|  | 2 |  |  |
| Fun and Recreation | 1 |  |  |
|  | 2 |  |  |
| Physical Environment | 1 |  |  |
|  | 2 |  |  |
| Career  | 1 |  |  |
|  | 2 |  |  |

**Daily Habits**

*Habits are positive actions you can take each day to achieve your goals. Based on the results of your Wheel of Life Exercise, what actions would help you move forward? I.e. spending 20 minutes a day exercising, talking with your kids without your cell phone etc.*

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Completion Log**

 **Item to Complete Do By Done**

|  |  |  |
| --- | --- | --- |
| Remove junk from pantry | Wed | Check |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |