

**Nurturing Life Concepts, LLC**  
**Wendy A. West Pidkaminy, LCSW-R**  
**Executive Officer**  
**8195 Cazenovia Road, Suite (9)**  
**Manlius, NY 13104**  
**www.nurturinglifeconcepts.com**

**Life Coaching Demographic (Intake) Form**

Today's Date:		
Name (First, Middle Initial and Last)		
Social Security Number	DOB	Age
Residential Address:		
Home Phone:	Cell Phone:	Work Phone:
Email address:		
<p>May we email, text and or leave messages? NLC will never include any personal information in such messages, unless initiated, authorized or requested to do so by you. NLC may contact you about missed or rescheduled appointments. Anyone who reads such information or listens to telephone messages would realize that you have come to see NLC for services. Also note that text and email correspondence is vulnerable to interception and is not considered reliably confidential. Know that you are sending info in this manner at your own risk.      Yes    No</p>		
You may email me at the following email address:		
You may text and or call the following phone number:		
Gender: M   F   T		
Education Level:		
Marital Status: Married    Separated    Remarried    Divorced    Widowed    In a relationship    other		

<p>Immediate Family Relationships/Family Constellation (spouse, children, siblings, parents etc)  List each person      <u>Name:</u>_____      <u>Relationship</u>_____      <u>Age</u>_____      <u>Location</u>  (ie live with you etc)</p>				
_____				
_____				
_____				
_____				
_____				
_____				
_____				
<p>Currently Employed or attending school: Y N Employer/School:</p>				
_____				
<p>Position Held:</p>			<p>Length of Time:</p>	
_____				
<p>Work Address:</p>			<p>Work Phone:</p>	
_____				

<p>Current Allergies: Y N If yes, please describe in detail:</p>	
_____	
<p>Have you ever been in the military or are you currently enlisted in any branch of the US military? Y N</p>	
_____	
<p>If you answered yes to the above question, did your military experience include any traumatic or highly stressful experiences which continue to bother you: Y N If yes please list:</p>	
_____	
<p>Have you ever been convicted of a crime or had legal difficulties? Y N If yes, please describe in detail:</p>	
_____	
_____	
_____	
<p>Have you ever been identified with a documented disability, including: ADHD_____; Deaf or hard of hearing_____; visual impairments_____; learning disorders_____; mobility impairments_____;</p>	
_____	

physical/health related disorders\_\_\_\_; neurological disorders\_\_\_\_; psychological disorders\_\_\_\_; Other (please specify):\_\_\_\_\_ If you checked yes on the above please provide detailed information:\_\_\_\_\_

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Medical History: (include current medications (prescribed, OTC, and supplements), hospitalizations, medical diagnoses/procedures, allergies, smoking history, caffeine intake, alcohol and drug use/abuse and exercise habits:

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Significant Psychiatric History/Current Treatment    Y    N    If YES, please explain

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**How can your coach best support you in the coaching relationship? Rank in order of importance**

- \_\_\_\_\_ Direction
- \_\_\_\_\_ Focus
- \_\_\_\_\_ Accountability
- \_\_\_\_\_ New Perspective
- \_\_\_\_\_ Relational Success
- \_\_\_\_\_ Motivation
- \_\_\_\_\_ New Challenges
- \_\_\_\_\_ Better Finances
- \_\_\_\_\_ Brainstorming strategies together
- \_\_\_\_\_ Support, encouragement, validation
- \_\_\_\_\_ Exploring and removing obstacles to your success
- \_\_\_\_\_ Insight into who you are and your potential
- \_\_\_\_\_ Working through self improvement programs together
- \_\_\_\_\_ Painting a vision of what you can become or accomplish
- \_\_\_\_\_ Directness: Asking hard questions, challenging you to move forward
- \_\_\_\_\_ Collaboration on action steps

**Life Changes**

Please list any changes you would like to make in the following areas:

Family: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Financial Situation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Career/Professional: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Relationships: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Friends/Support System: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Living Space/Home: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Personal Growth/Learning: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Health/Self Care: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Creativity: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Recreational/Leisure Time: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<p>What three specific goals do you wish to accomplish in the next three months?</p> <p>1</p> <p>2</p> <p>3</p>
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<p><b>What are the three biggest changes you want to make in your life over the next three years?</b></p>
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1

2

3

What is your main goal for our coaching sessions?

What are the three greatest accomplishments in your life to date?

What are the hardest challenges you have had to overcome in life to date?

Who are, or have been, your major role models?

What are your current hobbies?

How do you spend the majority of your leisure time?

Who are the key people in your life and what do they provide for you?

Is your life one of your choosing? If not, which parts are being chosen for you?

What are your primary stressors?

What major transitions have you had in the last two years? (ie new job, move, marriage, divorce, new baby, death of a loved one etc.)

On a scale of 1 to 10 (10 being highest) what is your level of stress right now? \_\_\_\_\_

On a scale of 1 to 10 (10 being highest) what is your level of satisfaction with your life right now? \_\_\_\_\_

On a scale of 1 to 10 (10 being highest) what is your attitude toward readiness to change (knowing that change is difficult and can cause discomfort and that you will have to invest time, money and energy to achieve desired results from coaching)? \_\_\_\_\_

How well do you keep your commitments when taking advice or working with someone toward your goals? \_\_\_\_\_very \_\_\_\_\_ moderately \_\_\_\_\_ not well

What would you love to have, be or do with your life that you don't have, aren't doing or being right now?

Do you have a personal or professional vision? If so, what is it?

What would you like to contribute to this world?

Do you wish to leave a legacy? If so what would that legacy be?

What is the minimum requirement from Life Coaching that will make you feel it was a worthwhile investment of time, money and energy?

What is your dream outcome of Life Coaching?



How many sessions do you believe it will take to accomplish your goals? \_\_\_\_\_

What are the challenges, limitations and obstacles holding you back from change?

If you could go back and change three things in your life, what would they be?

- 1
- 2
- 3

What one thing do you want more of in your life presently?

What one thing do you want less of in your life presently?

List three things you are tolerating presently in your personal life:

- 1
- 2
- 3

What are your strengths, talents, abilities and personal giftings?

Write your life story/history here: What information would you like to share with your coach?

## **Life Coaching Agreement**

### **Confidentiality Agreement**

The conversations had within the Life Coaching sessions are confidential and will be protected as such. Information will be shared outside of our sessions only with your written permission or in the event a court judge demands it. However, the following are instances where your Life Coach would be obligated by law to break confidentiality without your permission:

If it is assessed during your participation in coaching sessions that abuse or neglect of children or elders is occurring.

If in your Life Coach's presence you threaten to kill or harm another individual, and your Life Coach has reason to believe you may act on this threat, or that you may lose control of your actions.

If, at any time during the course of Life Coaching sessions, you present as a danger to yourself or others, your Life Coach will inform you of that opinion and make every effort to keep you from endangering your life. In some cases this may include notifying family members, support systems and the police.

### **Statement of Intent**

All coaching services delivered by NLC are meant to challenge, uplift, and support you psychologically. However, coaching is **not** psychotherapy/counseling even if it is being provided by a Licensed Mental Health professional-they will be in the role of Life Coach. If you feel emotionally or mentally stressed to the point it is interfering with daily functions please have the courage to speak up and seek the right kind of treatment for you which may include a professional mental health counselor. Your Life Coach will be happy to provide a list of referral names to you. In order to maintain healthy boundaries, your Life Coach may not switch roles and begin offering you mental health treatment. Life coaching may augment mental health treatment, but the work of coaching is meant to be done when major emotional and psychological wounds are already healing or healed. In that spirit please read the following and sign below should you agree to each statement and wish to proceed:

- I understand that Life Coaching services I am receiving from Nurturing Life Concepts, LLC and its staff are not offered as a substitute for mental health care. I also understand that my Life Coach is not acting in the capacity of a mental health counselor and does not purport to offer mental health care in a Life Coaching setting.
- I understand that my Life Coach will maintain confidentiality of our communications except what is written above and only to the extent defined by the laws of New York State (the residence of NLC).
- I understand and agree that I am fully responsible for my well being during my coaching telephone sessions, in person sessions and skype sessions and subsequently, including my choices and decisions.

- I understand that all comments and ideas offered by my coach are solely for the purpose of aiding me in achieving my defined goals. I have the ability to give my informed consent, and hereby give such consent to my coach to assist me in achieving such goals.
- I hereby release, waive, acquit and forever discharge NLC and my personal Life Coach their agents, successors, assigns, personal representatives, executors, heir and employees (Collectively NLC, LLC) from every claim, suit, action, demand or right to compensation for damages I may claim to have or that I may have arising out of actions, omissions, or commissions taken by myself or NLC as a result of the advice given by NLC or otherwise resulting from the coaching relationship contemplated hereunder. I further declare and represent that no promise, inducement or agreement not herein expressed has been made to me to enter into this release. The release made pursuant to this paragraph shall bind my heirs, executors, personal representatives, successors, assigns and agents.
- Sessions can be conducted in any of the following formats: telephone, in office, skype or facetime. Sessions last for 50 minutes or 80 minutes depending on your preference.
- Regular attendance at your scheduled appointments is one of the keys to a successful outcome in coaching. We reserve an hour or more for each appointment with a client. Appointments canceled at the last minute are very detrimental to this practice. Therefore, we ask that you notify us a minimum of one full business day (24 hours, Monday through Friday) prior to your appointment if you need to cancel. Appointments for Monday must be canceled by Friday at 4:00pm. Appointments for Saturday must be canceled by the prior Thursday at 4:00 P.M. ***You will be billed for appointments you fail to cancel in accordance with this policy. Currently, the fee billed for this is \$75.00. Repeated late cancellations or missed appointments will be billed at the full fee of \$100.00 and may result in termination of services. If you no show for an appointment, it is our policy to cancel all future scheduled appointments until the past due fees are paid in full.***
- Appointment availability varies with the client load at the time. High demand appointments (off hours, late afternoons, Saturdays) are likely to be sporadic in their availability. We reserve the right to limit commitments of high demand appointment times to any particular client in order to meet the needs of all clients and a balanced workload.
- NLC is being retained for Life Coaching services for the sole purpose of supporting you with respect to your self-awareness, vision and goals and strategic planning.
- If I am currently working with a therapist I will advise my Life Coach and sign a written release prior to Life Coaching services to ensure proper communication between your therapist and Life Coach.
- I understand all Life Coaching records are stored in an online, secure, web based program.
- A full coaching program generally runs 12 sessions or 3 months. A 3 month commitment ensures that you understand that it is hard to change habits of thinking and acting and that you are committed to making a concentrated effort to understand that it takes time.
- Your input and questions are welcome along the way. A Life Coaching relationship is collaborative. The more you put into it the more you will get out of it. Ask your Life Coach questions, challenge your Life Coaches point of view, bring resources you have found and share insights. You are your own best expert.
- Additional information regarding NLC services is listed on our website at [www.nurturinglifeconcepts.com](http://www.nurturinglifeconcepts.com)

**Financial Agreement**

Your fee per 50 minute session is \$\_\_\_\_\_

Your fee per 80 minute session is \$\_\_\_\_\_

(fees are subject to change every six months)

A full coaching program generally runs 12 sessions. You may choose sessions to pre-pay in sequences of 3 sessions for a 10% discount. For each additional sequence you will receive a 20% discount. You are required to follow the above cancellation policy if you cannot attend a session. If you do not follow the above cancellation guidelines you will be charged for that session. You have 12 months from the date of signing to use all pre-paid sessions.

3 session fee \$\_\_\_\_\_

6 session fee \$\_\_\_\_\_

9 session fee \$\_\_\_\_\_

12 session fee \$\_\_\_\_\_

Sessions can be paid with credit card, paypal, cash or check

**Statement of Understanding**

My signature below indicates that I have read, understand and agree to the above conditions written on pages 1-13. I consent to participate in services from Nurturing Life Concepts, LLC.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Print name Date

\_\_\_\_\_  
Signature and Print Name of Parent or guardian if minor Date

\_\_\_\_\_  
Signature and printed name of NLC Life Coach Date