

“Life Coaching with O qpvf”
COACHING CLIENT PROFILE

Welcome to our coaching partnership -- I'm looking forward to working with you. I've prepared the enclosed coaching materials to assist both of us in getting the most from our relationship. Please take time to complete these forms and return a copy to me as soon as possible. Thanks.

Date: _____

I. Contact Information

Name: _____

Address:	City:	State, Zip Code:
Office Phone:	Home Phone:	Cell:
Fax Number:	E-mail:	www.:

II. Personal Information

Your Birth Date:	Anniversary Date (if applicable):
Spouse's Name, Birth Date:	
Children - Names and Ages:	
Current occupation:	Present Company:
Health Problems/Medications?:	

Have you worked with a Psychiatrist or Psychologist?	If so, when/why?
Favorite Hobbies/Sports/Interests:	

III. Coaching Information

Who Do You Most Admire and Why?
What Are You Most Pleased and Proud of Having Accomplished and Why?
What Are Your Personal and Professional Strengths?

What is Your Passion in Life? What Makes You Happiest/Most Fulfilled? What Do You Offer That Is Unique and/or Excites You?

What Are Your Personal Life Goals for the next 90 Days?

What Are Your Professional Goals for the next 90 Days? If Job Searching, What is Your Time Frame for this to Happen?

What Motivates You? Why Do You Do What You Do? Personally or Professionally?

List 10 Things That Make You Smile:

What Else Do You Want Me to Know About You?

What Goals Do You Have for This Coaching Relationship?

IV. Coaching Policies and Procedures

A. This is the Initial Structure of Our Coaching Relationship.

Number of Sessions per Month: _____ **Duration:** _____ **Minutes**

Coaching conducted: _____ **by Phone** _____ **by Skype** _____ **in Person**

Initial Term: _____ **Months** **Start Date:** _____ **Renewal Date:** _____

Initial Session Date: _____ **Initial Session Time:** _____
Subsequent scheduling will be discussed and agreed upon.

****You may also agree to pay by PayPal prior to each session. You may schedule the sessions individually. There is no requirement that you buy a monthly package of sessions.**

B. Fee and Payment

Monthly Coaching Fee: \$ _____, paid in advance of the month to be coached.

Payment for coaching due:
_____ **on 1st of Month** _____ **15th of Month** or _____

Please send payment to: Monty Winters
3203 Alexan Drive
Cary, NC 27519

Please have payment arrive by the agreed-upon due date. A late payment fee of 5% will be assessed. You may pay by using PayPal. You may also pay prior to each individual session rather than monthly.

C. Periodic Reviews

We will conduct periodic reviews of the coaching partnership:

_____ **Quarterly** _____ **Bi-Annually** _____ **Annually**

Call Arrangement: Our arrangement can include as many as four calls per month.

Phone/Email Contact: In addition to the regularly scheduled calls per month, Client may call or e-mail me, if he/she needs to change the appointment time. If you reach my voice mail, please leave a message and let me know, if you want me to call back. Please limit phone or email contact to arranging, changing, or cancelling appointments.

Confidentiality: All interactions with you are kept strictly confidential.

Referrals: My practice fills by referrals. If you are benefiting from our relationship, please suggest my services to appropriate colleagues and friends.

Results: You are responsible for producing results and your decisions are your own. My responsibility is to explore with you the opportunities and possibilities available. I will be your #1 advocate, ally, and Coach and will assist you in building the life you want. I will respect your life choices.

Initial Focus of Our Work: _____

Call Policy:

- Call me at 336-317-1082 or at Skype: montywinters at our appointment time. If you get my voice mail, please hang up, wait one or two minutes, and call again - our clocks are not always synchronized.
- If I have to change an appointment, I will always reschedule it and make sure you have the call you paid for.
- If *you* need to cancel or reschedule the session, please give 24-hour notice. We will reschedule to a mutually acceptable time. Emergencies will be dealt with as they arise.
- Forgetting or just missing an appointed call is not an emergency. Missed appointments or non-emergency cancellations with less than 24-hour notice may be difficult to reschedule and will count as one of your scheduled calls.
- Client pays for long distance charges, if any.

Request: I request that you obtain access to e-mail, if you do not already have it. It will expedite and benefit our work together in regard to efficient scheduling. Please ask me for information regarding same, if needed.

Termination: The Client may cancel at any time, though I appreciate two weeks' notice so we can have an effective closure. Cancellation must be in writing or by e-mail.

Coach Disclaimer of Liability

Client hereby employs Monty Winters as Coach for the purpose of advising and coaching Client with respect to Client's life overall, developing interpersonal relationships and setting and achieving the Client's goals. Monty Winters has experience in such matters and agrees to render such coaching services.

Client understands and Monty Winters agrees that he is not an employment agent, a business manager, a financial analyst or a medical doctor and that he has not promised, shall not be obligated to, and will not: 1.) procure or attempt to procure any employment, business, or sales for the Client; 2.) perform any business management functions such as accounting services, tax or investment consulting, or advice with regard thereto; or 3.) diagnose or prescribe for any medical condition.

Counseling vs. Coaching: I understand that Monty Winters is a certified coach. He is contracting with the client for coaching services only. Client agrees to seek counseling or psychiatric assistance from a local, licensed counseling professional or psychiatric service provider, if needed.

Consent: I have read the above information and policies and have clarified any questions I have. I agree to the stated terms.

Client's Signature

Date

Monty Winters, Coach

Date

Monty Winters, M.S.
336-317-1082
coachmonty@gmail.com

DESCRIPTION OF ISSUES

PLEASE CHECK THE MOST SIGNIFICANT ONE(S):

CHILD ABUSE FINANCIAL HEALTH RELATED WORK CONFLICT

DOMESTIC VIOLENCE ELDER CARE ALCOHOL DRUGS

MARITAL PARENTING/FAMILY EMOTIONAL

LEGAL DEPRESSION STRESS/ANXIETY LOST TIME/DAY

DREAMING

EATING PROBLEM

PRESENTING ISSUES OR GOALS: (WHY IS CLIENT SEEKING ASSISTANCE TODAY?)

MAJOR SYMPTOMS:

ARE THERE ANY SPECIAL CONFIDENTIALITY CONCERNS?

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How We Will Work Together

Welcome to your coaching experience. I am honored to be your coach. Life Coaching is about helping people have more satisfying lives. I will be your advocate as you discover and design a life that offers freedom, balance, opportunity and an open space to create possibilities. We are a team, and I'm committed that together we accomplish every desire and goal that you bring forth.

My clients are wonderful, interesting, capable people

All my clients are intelligent, extraordinary, successful people whom it is my genuine good fortune to serve. I will enjoy working with you.

The Roles of Coach and Client

The role of a coach and client is as peers. I am a trained, certified, professional coach, not a licensed therapist. I will not attempt to provide diagnosis or treatment. I will tell you what I want for you, but our coaching relationship is about your agenda always. I listen, reflect, ask questions, give perspectives, and options. I support you to find and foster your integrity and I believe that you know what is best for you.

As my client, I ask you to show up fully prepared and present for each session, pay attention to what you are feeling and wanting, tell the truth without blame or judgment and be open to outcome rather than attached to outcome. I will do the same.

I expect you to be committed to the process

If you are hiring me I imagine that you are ready to make meaningful transformation inside and out.

I'm here for you

Our relationship is a top priority for me. I ask that you use me as the resource that I am.

Communication

Please share with me your wins, challenges, anything you like, as well as your coaching experience. I want to know what works as well as what does not. I am committed to serving you.

How We Will Work Together (2)

I pay attention

If I hear something in your voice or notice something is amiss, I'm likely to ask you about it. Often, small moments bring about big shifts.

Requests

I ask clients to stretch themselves gently, deepen the work done in the sessions by taking some actions, resolving relationships or work on situations that feel incomplete. You are free to accept or decline. Negotiate for what is right for you. Please come prepared to create something you want for yourself.

Ways You Can Get More From Your Coaching Experience

- ✓ Make our coaching sessions a priority
- ✓ Come to every call with a specific agenda
- ✓ Do the work between the sessions
- ✓ Utilize what you learn; complete what you agree to do
- ✓ Be open-minded
- ✓ Try new approaches
- ✓ Experiment
- ✓ Get to know who you are right now, & be open to transform into who you would like to be
- ✓ Stop tolerating
- ✓ Stop suffering
- ✓ Tell the truth to yourself, to everyone
- ✓ Be willing to transform your beliefs if they do not serve you anymore

Fees

- First payment is taken at time of agreement
- My fee is payable prior to each session or on a monthly "package" plan
- I accept checks and cash or PayPal (any checked returned will be a \$25 fee)

Please make checks payable to "Monty Winters" and mail to:

Monty Winters
3203 Alexan Drive
Cary, NC 27519

Please include my fees in your monthly budget. Please pay on time. You may pay for single sessions arranged as needed. If you cannot adhere to this policy, please let me know. However, if we discuss another arrangement openly, I can be flexible.

Monty Winters, Coach
coachmonty@gmail.com
336-317-1082

How We Will Work Together (3)

Session Procedures

- You will call me for all sessions, please make sure your available at the call time given. You can call me by phone: 336.317.1082 or Skype: MontyWinters
- If you forget a session without communicating ahead of time it will count.

Schedule changes/ Vacations/ Business trips

Please give our call high priority and arrange your schedule to honor our agreed upon time. If you must reschedule our call, I ask you to give me 24 hours notice. In any case, let me know as soon as you are able. I will not reschedule no call/ no shows. If you have a vacation or business trips that will conflict with our sessions, please notify me of these as soon as you have an itinerary and we will discuss when to reschedule. I will do the same with you when I plan trips. Please make sure to fully read and understand all policies and procedures. I invite you to ask questions. I will be as flexible as I can as long as it has us both be empowered and a commitment and agreement are in place. I'm looking forward to creating a helpful coaching relationship.

Sincerely your Coach,

Monty Winters

I have read & understand all the above Policies and Procedures. I agree to comply with them. If I have any questions or anything is unclear, I commit to communicating with Monty Winters so they are clear.

Client _____ Date _____

Monty Winters, Coach
coachmonty@gmail.com
336-317-1082

On this page, feel free to send me any comments or questions about our coaching relationship:
