

Pre-coaching Client Intake form



1) Client Information

Name _____

Address _____

City _____ State _____ Zip _____

Work Phone _____

Home Phone _____

Cell Phone _____

Email _____

Age _____

Birthdate _____

For coaching to be successful, it is very important for a relationship of honesty and trust to exist between client and coach. There are many aspects of your life that may subconsciously affect your trading success. This form touches on information that is often very difficult to discuss with other people. The information may play an import role in the success of our coaching. Please answer the questions honestly and thoroughly. If you need more room, there is exrrtra space at the end. This information solely for the use of our coaching process and will be held in the strictest of confidence.

2) Personal Information

A. Explain your Family History (where you were born, lived, parents, siblings, other people?)

B. Education (where & what level? What role did it play in your life? Parental expectations?)

C. Work history (briefly, and include favorite and least favorite jobs)

D. Relationship with Parents (relationship -communication-honesty)

E. Relationship with wife (communication-honesty-trust-sexual issues)

F. Relationship with children (communications-trust- what did you passed on to them?)

G. Relationship with siblings (Their names-ages-present relationship?)

H. Relationship with friends, co-workers

I. Role of religion & spirituality in your life

J. Dependencies/Addictions (smoking, alcohol, drugs, sex, food, sugar, adrenaline, computer)

K. Hobbies, pleasures-passions (what do you draw the most energy from?) (what satisfies you?)

L. Attributes (personal and professional strengths. At least 5) (describe yourself at your best)

M. Traits that challenge (what causes shut down? At least 2?) (Describe yourself at worst)

N. Greatest challenges (physical—emotional)

O. In what areas do you procrastinate?

P. Things about personal or professional life that you're most proud

Q. Things about life (personal-profession) that you feel shame, sadness fear about (effect?)

R. Behaviors or beliefs that stand in the way of success in personal or professional life

3) Financial: Insights to Financial and Business Attitudes

Describe financial situation (comfort level) (Percent assets in home, cash.. retirement,etc?)

A. Have you every filed bankruptcy? (or been close to it?)

B. What level of funds are committed to trading?

C. Retirement situation (who manages?) (do you max out contributions?)

D. Insurance?

E. IRS situation (past-present. Do you Pay taxes on time?)

F. Sources of income (ever started a business?)

G. Lifestyle/Home-car etc. (do you live within your means?) (have you estimated budget?)

H. How do you like expensive cars or boats? (what do you like that is extravagant?)

I. What are your Attitudes about taking care of things you own?

J. Do you Save or overspend?

K. Debt, Credit cards? (mortgage, other debts? Do you Pay off credit cards every month?)

L. What role does professional life and/or trading and investing plays in who you are?

M. Mistakes made with money (how did you feel?)

N. Good investments? (what were they and How do they make you feel?)

O. What holds you back from success in your financial-business life?

4) Impact, Personal Work & Expectations

A. Describe the person that has made the most impact on your life

B. Describe who you have made the most impact on

C. What role do you see yourself having in the world? (impact?)

D. How would you like to be remembered? What is your legacy?

E. Do you have a sense of life purpose or mission?

F. Have you done personal growth work? (mens groups, couples or therapy?)

G. Have you ever thought about suicide? (when was the last time?)

H. Do you mediate or journal?

I. What is your expectation for the first 3 months work with me?

J. What is your long-term goal?

K. What will be your measure of success?

L. What will get in the way?

M. Describe your commitment to trading. (time you'll spend-what your giving up?)

N. What is the most exciting part of beginning this coaching process?

O. What is the scariest part of starting this coaching process?

P. Anything else I should know about you that will help me know you or coach you best?

5) Additional Notes or Comments
