



Date: _____

LIFE COACHING INTAKE FORM

Welcome! Thank you for choosing New Tides. This form helps me understand your goals and create a personalized coaching experience. Please complete honestly - your responses are confidential within coaching limits.

PERSONAL INFORMATION

Full Name _____

Address _____

Phone Number _____ Cell Phone Number _____

Email Address _____ Time Zone (if virtual sessions) _____

Emergency Contact _____

Relationship _____ Phone Number _____

Preferred Communication Method:

Text Email Call

Referred to life coaching by _____ Age/Birthday _____

Check Status: Single Married Separated Divorced Widowed Cohabiting Other

PROFESSIONAL BACKGROUND

Employment Status: Employed Self-employed Student Retired Unemployed Other

Occupation/Employer _____ Highest Education _____

Employer Address _____

YOUR JOURNEY

1. What is the main reason for seeking life coaching right now? Be as specific as you want.

2. What are your short-term goals? (next 3-6 months)

3. What are your long-term goals? (next 1-5 years)

4. What does success look like for you in coaching? How will you know we've made progress?

5. What strengths or positive qualities do you bring?

6. What values or principles guide your life/decisions?

7. What challenges or obstacles are you facing?

8. Have you done coaching, therapy, or assessments before? If yes, please summarize. (e.g.: *MBTI, StrengthsFinder*)

WELL-BEING CHECK *(Optional)*

On a scale of 1-10, how would you rate your overall energy and physical health? _____

Do you have any ongoing health factors affecting your daily life/motivation? *(State briefly)*

Are you currently under medical care or taking medications that impact your focus/energy? Yes No

Do you use tobacco, alcohol, or other substances in a way that concerns you or affects your goals? Yes No

FAITH & SPIRITUAL LIFE *(Optional)*

Do you desire faith-based elements in our coaching sessions? Yes No
If yes, any preferences or boundaries? *(e.g. scripture reflection, prayer)*

How would you like faith to influence or support your coaching journey?
(e.g. integrating prayer, seeking God's direction, aligning goals with purpose)

CONFIDENTIALITY & AGREEMENT

All information shared during the life coaching process is treated as confidential and will not be disclosed to third parties without your written permission. Confidentiality in life coaching is based on professional ethics and the coaching agreement, not on therapist–client privilege or healthcare privacy laws. Life coaching is not mental health therapy, counseling, or a substitute for psychological or medical treatment. Life coaching records are maintained for coaching purposes only and are stored in a secure manner. Communication by email, text, or other electronic methods carries inherent privacy risks, and by engaging in coaching services you acknowledge and accept these risks. If issues arise during coaching that appear to require mental health treatment, you may be encouraged to seek services from a licensed mental health professional.

By signing, I confirm I've answered accurately, understand coaching is not therapy/medical treatment, and agree to the confidentiality terms.

Signature _____ Date _____