

# BALANCING THE MIND, BODY AND SPIRIT



**CARLA WALKER – STRATEGIC COACH & LMFT**

**661-803-1352**

Date: \_\_\_\_\_

CLIENTS FULL NAME: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Cell: \_\_\_\_\_

Work: \_\_\_\_\_ Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_ SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

DL#: \_\_\_\_\_

**Please check which Coaching Service would best serve you:**☐**LIFE COACH**

What do you want? Are you stuck in a pattern? Coaching helps you direct your focus and take massive action.

☐**MARRIAGE COACH**

Are you lacking passion or confused if you are done? Do you know you want more but are unsure how to get there? Does work or the children come first? Do you not know how to get your needs met?

☐**MINDFUL/BALANCE COACH**

Are you stressed, moody and unhappy? Is your body feeling stuck? Do you spend too much time on the couch due to lacking inspiration? When was the last time you woke up in the morning feeling unbelievable? What do you do for fun?

☐**DIVORCE COACH**

Are you questioning if there is any possibility I can save my marriage? Are you at the end of your rope? Are you missing your partner?

☐**TRANSITION COACH**

Did you just have a major life change? Did you have go through a divorce, death, moved, job change and not fully adjusted?

☐**WOMAN'S COACH**

Would you like to destroy doubt? Would you like to discover who you are? Are you living fully on purpose? Do you wrestle in your mind if you are good enough?

☐**FAMILY COACH**

Are you feeling great about parenting your children? Are you all running in different directions? Looking for new effective tools?

☐**TRAVELING COACH**

Do you hate to fly or simply don't have the time? Carla will travel to you. You book the first class flight or send your jet to Van Nuys Airport. Book a suite and she will provide 2-3 days of intensive Coaching. Make leaps and bounds. She will return again in 4-6 weeks for you to continue your momentum. There may be weekly sessions in between if necessary.

☐**BABY BOOMER COACH**

Are you wondering what to do with the rest of your life? Are you caring for a parent or your grandchildren? Do you have a bucket list that is sitting in a drawer?

Welcome to my Coaching Practice. This agreement outlines both our responsibilities in this powerful relationship.

Please read this over and if everything is fine, indicate your agreement and submit at the bottom. Of course, let me know if you have any questions or concerns!

This document and attachments constitute a contract between us (the “AGREEMENT”) and you should read it carefully and raise any questions and concerns that you have before you sign it.

The services to be provided by Carla Walker are coaching in person, zoom or tele-coaching. The fee for coaching sessions will be charged at the rate of **\$495** per 50-minute hour. If I am required to attend meetings outside of my offices, you will pay for all time I spend traveling to the location of such meetings. Fees for coaching sessions must be paid at each session. You are required to give 48-hour notice if you need to cancel or change the time of an appointment. Otherwise, you will be charged **\$495** for the session in full. Carla Walker agrees that every effort will be made to reschedule sessions which are canceled in a timely manner.

COACHING GUIDELINES:

I have positive expectations for our coaching relationship and you creating the life you want to live. To partner together professionally, I want you to be familiar with the following guidelines.

TERMS OF COACHING:

I invite you to think of Coaching as a process.

FEES:

My Coaching fee is payable to Carla’s Counseling, Coaching and Classes. If you pay by credit card, I will charge the day of the session.

Credit Card: (THIS IS MANDATORY and will be used in the event of a missed session or late cancel) Visa/MasterCard/Discover/American Express:

NAME: \_\_\_\_\_ CARD NUMBER: \_\_\_\_\_  
EXP \_\_\_\_\_ SECCODE \_\_\_\_\_ DATE: \_\_\_\_\_ ZIP CODE \_\_\_\_\_  
Signature: \_\_\_\_\_

PROCEDURE:

Sessions will with be in the office, Zoom, in your home or office or I will call you at a specified time, unless we make other arrangements.

CHANGES:

If you need to reschedule our appointment, please give 48-hour notice. If you have an emergency or illness, you can reschedule with less than 24-hour notice. If you do not show up for a scheduled time, for any reason, and provide no notice (latest notice can be 15 minutes past scheduled session start time), we will not make up that time. If I need to reschedule, I will give you at least 48 hours’ notice as well, barring an emergency or illness.

I agree to serve as your Coach - to partner with you to identify and achieve your personal and/or professional goals. As your Coach, I cannot guarantee results. You will create powerful results by having the courage and determination to forward the action in your life.

During the time we spend together in our coaching sessions, I will devote my time, thoughts, and energy to you.

## I AM A COACH AND A PSYCHOTHERAPIST.

### COACHING & PSYCHOTHERAPY

In addition to being a coach, I am also a licensed in California with training and experience in diagnosing and treating emotional problems. While there are some similarities between coaching and psychotherapy, they are very different activities and it is important that you understand the differences between them. Psychotherapy is a health care service. This is not true for coaching. Both coaching and psychotherapy utilize knowledge of human behavior, motivation and behavioral change, and interactive counseling techniques. The major differences are in the goals, focus, and level of professional responsibility.

The focus of coaching is development and implementation of strategies to reach client-identified goals of enhanced performance and personal satisfaction. Coaching may address specific personal projects, life balance, job performance and satisfaction, or general conditions in the client's life, business, or profession. Coaching utilizes personal strategic planning, values clarification, brainstorming, motivational counseling, and other counseling techniques.

### CONFIDENTIALITY

As a licensed Marriage and Family Therapist, I am ethically and legally bound to protect the confidentiality of our communications. I will only release information about our work to others with your written permission or in response to a court order. There are some situations in which I am legally obligated to breach confidentiality in order to protect you or others from harm. If I have information that indicates that a child or elderly or disabled person is being abused, I must report that to the appropriate state agency. If a client is an imminent risk to him/herself or makes threats of imminent violence against another, I am required to take protective actions. These situations are quite rare in coaching practices. If such a situation occurs in our relationship, I will make every effort to discuss it with you before taking any action.



**As you are no doubt aware, it is impossible to protect the confidentiality of information that is transmitted electronically. This is particularly true of e-mail and information stored on computers that are connected to the internet, which do not utilize encryption and other forms of security protection.**

**As your Coach, I will bring attentive listening, understanding, belief in you and commitment to your success. You can expect me to challenge you, offer fresh perspectives, make requests (including assigning homework), acknowledge your wins, and guarantee utmost confidentiality (to the fullest extent of the law, and so long as I don't fear for your or another's safety) in the powerful, sacred relationship.**

### CLIENT

I am motivated and committed to taking action on my determined personal and professional goals. I realize that anything less than my intentional full participation will not lead to my success.

I accept full responsibility for myself and any actions I take that might result from Coaching.

I am under the care of a physician and healthy enough to engage in coaching. I agree that ultimately, it is my responsibility that my coach gets paid for the services.

I agree to honor my scheduled session times.

I have read and agree with the Coaching Guidelines and the Coaching Agreement with me in between sessions with a challenge, a success or an inquiry, I will make every attempt to respond to your e-mail within 24 hours, with an email or short phone call at your discretion.

## STRENGTHS ASSESSMENT (CHECK ALL THAT APPLY) CLIENT'S

Trustworthy	Listens well	Kind	Playful
Sense of humor	Flexible	Spontaneous	Open to grow
Courageous	Forgiving	Enjoys learning	Creative
Walks erect	Calm	Fun	Resourceful
Happy most of the time	Good communication skills	Living life on purpose	Living up to your potential
Up to date	Decisive	Organized	Keeps your word
Does not take things personally	Confident	Financially stable	Does not make assumptions
Does your best everyday	Team player	Relaxes	Eats Healthy - organic
Has energy to play	Articulate	Generous	Accepting of others
Exercises 4 + times per week	Dreams	Financially wise	Living from inspiration
Artistic	Timely	Peaceful	Drinks 8 cups of water a day
Good self esteem		Good memory	Enjoys sex
Sexy	Handsome	Passionate	Quiets your mind 2 times a day
<b>Takes supplements</b>	Knows how to play	Sets intentions	
Add your own:			

You will be charged for missing an appointment, no show/ not giving at least 48-hour prior notice to canceling appointment. \_\_\_\_\_

Confidentiality is maintained with these records, as with all records in our office.

Messages regarding appointments may be left on my voice mail. \_\_\_\_\_ Yes \_\_\_\_\_ No

## ADDRESS CHANGES

Please advise me if you change your address, telephone number, or place of employment.

**Write 3 of your beliefs that support your life:**

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**What is your general energy level 1-10? \_\_\_\_\_**

**GOALS: What are the top 3 goals you want to achieve over the next few months?**

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**If you were a super hero who would you be? Why?**

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**What are three changes you want to make in your life over the next 2 years?**

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**PERSONAL HISTORY: What would you say have been the three biggest accomplishments in your life to date?**

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**What is the hardest thing you ever had to overcome?**

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**What major transitions have you had in the past two years (e.g.: entering new stage of life, a new relationship, a new job, a new residence, marriage, divorce, birth, death, etc.?)**

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**YOUR LIFE: Who are the key people in your life?**

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**On a scale of 1-10 (10 = highest), what is your current degree of stress?** \_\_\_\_\_

**What are your primary stressors?**

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**List five (5) things that you are tolerating or putting up with in your life at present (e.g.: information you can't find, rude people, cluttered house, poor lighting, dead plants, dented car, dated wardrobe etc.)**

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

**What would expect or like your coach to do if you get behind on your goals?**

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**How will you know when you are receiving value (e.g.: your money's worth) from the Coaching process?**

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**POTENTIAL & POSSIBILITY: Do you have a personal or professional dream?**


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**What part of yourself, if any, have you let go?**


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On a scale of 1-10 (10 = highest), rate the quality of your life today: \_\_\_\_\_ My Commitment to achieving my goals is 25% \_\_\_\_\_ 50% \_\_\_\_\_ 100% \_\_\_\_\_ **(Initial)** Carla Walker -Commits 100% every time \_\_\_\_\_ **(Coach Initial)**

I HAVE READ AND UNDERSTAND THESE OFFICE POLICIES.

_____	_____	_____
DATE	CLIENT/PARENT/CAREGIVER	SIGNATURE
_____	_____	_____
DATE	COACH	SIGNATURE