

WBYW Client Profile

Welcome to our coaching partnership! I'm excited to begin 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 this series of forms and return a copy to me as soon as you can.

Date: _____

I. Contact Information

Name: _____

Address	City, State, Zip
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Office Phone	Home Phone	Cell
Fax	Voice	Pager

Email	www.
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II. Personal Information

Your Birthday	Anniversary Date
Spouse/SO	Spouse/SO Birthdate
Children	Pets
Education	Previous Occupations
Current Occupation	Company
Office Phone	Office Fax

General Health	Temperament
Diagnosed with ADD?	When
If so, Do You Use Meds?	Others in Family w/ADD?
List Your ADD Support Team	
Current or Previous Problems with Depression?	Current or Previous Problems with Alcohol or Drugs?
Any Family History of the Above?	
Quality of Relationships with Family and Friends?	
<input type="checkbox"/> Poor <input type="checkbox"/> Fair <input type="checkbox"/> Good <input type="checkbox"/> Excellent	
Describe Your Workspace	Any Sleep Problems?
Describe Your To-Do List or Number of Projects in Process	
Are You Always On Time or Always Late?	
Are You Impulsive? When?	
Have You Worked with a Counselor/Therapist?	
How Do You Like to Learn? (visual, tactile, auditory, verbal, kinesthetic, cerebral)	
Personality Type	Brainstyle

Favorite Color	Favorite Flower
Favorite Fragrance	Astrological Sign
Favorite Candy/Sweet/Food	
Favorite Restaurant or Type of Cuisine	
Favorite Cartoon or TV Character	
Favorite Type of Music/Artist	
Favorite Spot or Location	
Favorite Charity	
Hobbies/Sports You Enjoy/Play	
Do you Have an Animal Mascot/Spirit Guide/Association	
What Do You Do for Fun	
Do You Like to Read? If so, What?	
What's Your Favorite Toy Store?	
What's the Most Thoughtful and/or Appreciated Gift You've Ever Received?	
How Do You Treat Yourself Special?	
What Sort of Stores Do You Enjoy Getting Gift Certificates To?	
What Do You Enjoy Collecting?	
What's Your Idea of the Perfect Mini-Vacation?	
You Know You're Loved When	

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 Want for Yourself, Others, and for Life? What Is Truly Most Important to You?

What Do You Want Professionally? Why Do You Do What You Do? What Do You Offer That Is Unique and/or Excites You?

What Is Your Legacy? What Do You Want to Leave for Others After You're Gone?

What Motivates You?

Make a List of 10 Things That Make You Smile

What Are You Putting Up With that Is Holding You Back? (bad habits, beliefs that no longer serve you, recurring problems, unhealthy relationships)

List 10 Things You Are Now Willing to Do or Change

Where Are You Most Irresponsible?

How Have You Sabotaged Yourself in the Past, and How Might You Sabotage Our Coaching Relationship?

What Are Your Personal Life Goals?

What Are Your Professional/Business Goals?

What Is Your Life Purpose or Mission?

What Goals Do You Have for This Coaching Relationship?

IV. Our Coaching Relationship and Logistics

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

Number of Sessions per Month: _____ Duration: _____ Minutes

Coaching conducted: _____ by Phone _____ in Person _____ in Group

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

Initial Session Day: _____ Initial Session Time: _____

Scheduling thereafter is determined as we go along.

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 _____

Payment is sent to Wind Beneath Your Wings, 3700 Oak Ridge Drive, Bryan, TX 77802.

Please see that your payment arrives by the agreed-upon due date. If you wish to pay by credit card, complete the separate form enclosed.

C. Periodic Reviews

Periodic reviews of the coaching partnership will be conducted:

_____ Quarterly _____ Bi-Annually _____ Annually

Call Arrangement. Our arrangement includes three calls per month. There will be a week off each month which allows you to integrate/work on what you're learning and advance your goals. Certain months have more than four weeks; in these months, we will have two weeks off and resume calls the following month.

Extra Time. We meet formally three times a month, but please understand that I am available, literally, 24 hours a day to you. Please call or email me between our regularly scheduled calls if you need advice, have a problem, or can't wait to share a success. If you reach my voice mail, please leave a message and let me know if you need me to call you back. If you send an email and need a quick response, please indicate that in the subject line. I enjoy providing this extra level of service. I do not bill for additional time of this type, but I ask that you keep the extra calls to 5 or 10 minutes each, please. Please know that I'm always here for you.

Problems. If I ever say or do anything that upsets you or that doesn't feel right, please bring it up. I promise to make you right for it and do what is necessary to have you be satisfied. We will work on all things like this as a team. I value truth and expect you to tell me if I overstep.

Confidentiality. All interactions with you are kept strictly confidential. I may occasionally consult my own coach on your behalf, but that is the only exception. If I do, you will not be identified by name. If I offer to talk to another coach colleague on your behalf, I will be requesting your permission to discuss your situation, again without identifying you by name unless you give permission otherwise.

A coach doesn't gossip. That means that what you are doing, how you are doing, what you have accomplished, and your personal secrets and shares are not discussed or hinted at by me to anyone else. From time to time, the person who referred you to me may ask how you are doing. My stock answer: He/she is doing just fine. (Period.)

My client list is confidential. People may know you are working with me, but that information won't come from me unless you've so directed me. For marketing purposes, I may request a statement from you of the value and successes of our coaching, if you are willing to do that. You will say whether you want quoted or given attribution or not. I may occasionally in a newsletter refer to client successes and growth, but those will always be strictly anonymous unless you want to share the good news. I hope you see that in every case, you have the option of speaking about our coaching partnership while I will hold it in strict confidence, sharing only if and what you choose.

Referrals. My practice fills by referrals. If you are benefiting from our relationship, I hope you will suggest that appropriate colleagues and friends of yours speak with me.

I know many coaches and their specialties. I will be happy to speak with anyone you send me, and I will introduce them to the coach who I think is qualified and "right" for their needs, whether it is me or another coach.

Results. You are responsible for producing results, and your decisions are your own. I will always respect whatever you choose to do in any situation.

What I want for you is a simple, happy life, however you define and design that for yourself. I am your #1 advocate, cheerleader, and coach, and I am available to you at any time as we build the life you want. But understand that I am not responsible for your outcomes; my job is to show you the opportunities and possibilities available.

I will always tell you the truth as I see it, try to be unconditionally constructive, and acknowledge what is. I ask that you also always tell me the truth as you see it.

Initial Focus of Our Work: _____

V. Coaching Policy and Agreement

Successful relationships are based on clear policies and procedures, so please review the following. If you have any questions, just ask at our next session or call/email me. Unless you have asked about a policy, we both accept that you have read, understood, and agreed to all policies and procedures in this document.

Call Policy.

- Call me at **409-846-6337** at our appointment time. If you get my voice mail, please hang up, wait one or two minutes, and call again – our clocks aren't always synchronized.
- If you routinely call late, I will ask you to correct that behavior.
- If *I* have to change an appointment, I will always reschedule it and make sure you have the calls you paid for.
- If *you* need to cancel or reschedule the session, please give 24 hours notice. I am aware that emergencies sometimes arise, and we'll deal with those together. However, forgetting does not count as an emergency. Please understand that it is difficult to reschedule.
- If you have to change an appointment with 24 hours notice, I will make sure it is rescheduled.
- If you change an appointment with less than 24 hours notice, I will do what I can to reschedule, but no promises.
- If you miss an appointment with no notice, it is not rescheduled and you pay for it anyway.
- Client pays for long distance charges, if any.

Payment Procedure. Payment is made in advance for each month of coaching. The first coaching session will begin once this agreement is signed, sent to me, and the first payment is received. I do not permit late payments, unless prior arrangements have been made. If you are having a challenge, just let me know. Otherwise, if you constantly pay late, I will ask that you find another coach.

Request. I request that you get access to email if you do not already have it. Our work will be much more expedient and direct if you have email.

Termination. The Client may cancel at any time, though I appreciate a few week's notice so we can have closure. Cancellation must be in writing, by fax, or email.

Dispute Resolution. Any disagreement arising from the terms of this contract will be submitted to arbitration, to occur via telephone. The parties agree to be bound by the decision of a mutually agreed upon arbitrator whose fees will be split equally between the parties.

Coach Disclaimer of Liability

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

Client understands and Barbara Luther agrees that she is not an employment agent, a business manager, a financial analyst, a medical doctor, or a psychotherapist, and that she 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; (3) diagnose or prescribe for any medical condition; or (4) act as a therapist, providing psychological counseling, psychoanalysis, or behavioral therapy.

Coach:

- 1) I agree to serve as your coach to help you achieve mutually agreed upon goals which may include, but are not limited to:
 - a) Personal and/or professional clarity
 - b) Increased production and/or superior job performance
 - c) Increased physical health
 - d) Creating ideal personal and/or professional relationships
 - e) Developing increased self-sufficiency and self-respect
 - f) Developing greater self awareness
 - g) Increased understanding of ADD symptoms and systems
- 2) As your coach, I cannot guarantee results. I can tell you that you will create different results just by having the courage to experiment with your life.
- 3) During the time we spend together in our coaching, I will devote my time, thought, and energy to you exclusively. In between our sessions, I may not be readily available as I will be attending others, including myself. I will return your call or email within 24 hours Monday through Thursday.
- 4) I will maintain confidentiality regarding information you choose to share with me.
- 5) I am not trained to provide psychotherapy. If any issues come up for you that should be handled by a licensed therapist or physician, we can stop coaching while you attend to your health. Or, if coaching and therapy can co-exist for you (you can still move forward toward your goals), we can continue.

Date

Barbara Luther

Barbara Luther, Coach

Client:

- 1) I want to accept full responsibility for myself. I realize that my success depends largely on how I conduct my life, how I think, how I feel, and what I do. I am aware that blaming anything or anyone, including myself, won't help me to succeed.
- 2) I am being coached to improve my life. That means I am willing to change how I think, feel, act, and how I treat myself if necessary to be successful (by my own measurement). I know that anything less than my full participation will lead nowhere.
- 3) I am willing to enter into open, honest, and trusting communication and will consider your feedback in order to benefit my growth and success.
- 4) I know that I must experiment with different ways of being, doing, having, and communicating in order to find ways that suit me best. I know that no one way will work forever so I must experiment, while at all times maintaining my integrity, to find the best ways for me. I realize that trying out new ways will at times feel awkward, artificial, uncomfortable, and even frightening at first.
- 5) I can financially afford the coaching fee (listed above) at this time. I agree to pay promptly by the agreed-upon date for the following month's fee.

I have read and agree with the terms on these Client Profile pages.

Date

Signature of Client

VI. Comments and Notes

Thanks!