

## **Client Record Forms**

**FORM A: CLIENT CONTACT SHEET**

**FORM B: CLIENT BACKGROUND INFORMATION**

**FORM C: DAY TO DAY RECORDS**

**FORM D: POST SESSION CLIENT NOTES**

**FORM E: GOAL ATTAINMENT CHECK LIST**

**FORM F: PAYMENT ARRANGEMENT**

**FORM A: CLIENT CONTACT SHEET**

**Client name:** \_\_\_\_\_

**Home/ cell hone:** \_\_\_\_\_

**Work phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Mailing address:** \_\_\_\_\_

**First session date:** \_\_\_\_\_

**Session start date:** \_\_\_\_\_

**Expected session end date:** \_\_\_\_\_

**Potential goal:** \_\_\_\_\_

**Special Notes:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**FORM B: CLIENT BACKGROUND INFORMATION**

**Immediate family members:**

**Support network:**

**Employment:**

**Job satisfaction rating:**

**Significant moment in their life:**

**What has stopped them from completing their goals before now?**



**FORM D: CLIENT NOTES**

**CLIENT:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**PROGRESS NOTES:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CLIENT CHALLENGES/CONCERNS:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CHALLENGES/CONCERNS COACH VIEWS:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ADDITIONAL NOTES:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



## **FORM E: GOAL ATTAINMENT CHECK LIST**

**CLIENT:** \_\_\_\_\_

**Has a plan to increase self worth**

**Chose a goal that resonated with authentic self**

**Formulated a concrete goal**

**Formulated goal attainment plan**

**Selected powerful affirmations**

**FORM F: PAYMENT ARRANGEMENT**

**DATE:** \_\_\_\_\_

**CLIENT:** \_\_\_\_\_

**FULL PAYMENT**

**PAYMENT PLAN**

**PAYMENT METHOD**

**PayPal**

**Visa Master**

**Card Amex**

**Personal**

**check**

**Business**

**check Cash**

**Other:** \_\_\_\_\_

**PAYMENT PLAN DETAILS (if applicable):**

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**RECEIPT GIVEN**

**CLIENT WELCOME AGREEMENT PACKET GIVEN**

**NEXT SESSION SCHEDULED: DATE AND TIME** \_\_\_\_\_

**CLIENT AGREEMENT: SIGNED AND RETURNED**