



# Client Assessment

To be completed and returned before  
Initial Coaching Session.

Date:

Name:

Home Address:

Employer:

Day Phone:

Evening Phone:

E-mail:

Birthday:

Key people in your life/relationships:

(1) What results do you want to achieve through our coaching partnership?

(2) When you attain those results, how will you feel?

(3) Coach's role (*What do you expect/desire from me?*)

- (4) What personal rules, philosophy or words of wisdom guide your life and help you make decisions? List the ones more important to you.  
Example: Treat others as I want to be treated.

- (5) What do you most value:  
In personal relationships?

In professional relationships?

- (6) List at least five of your personal strengths or assets:
- (a)
  - (b)
  - (c)
  - (d)
  - (e)

(7) List at least five of your time wasters, excuses, etc.:

(a)

(b)

(c)

(d)

(e)

(8) List at least five incomplete items (things you need to complete in order to experience a sense of "freedom," e.g., clean a closet, balance checkbook, communicate with someone, etc.). Please be specific.

(a)

(b)

(c)

(d)

(e)

(9) What are you committed to for your quality of life? (ie exercise, vacations, prayer, family time, etc)

(a)

(b)

(c)

(d)

(e)

(10) List at least five choices or goals that are short-term (6 months-1 yr), specific, measurable and dated:

(a)

(b)

(c)

(d)

(e)

(11) Describe how you want your life to be in five years:

(12) Finish the following statement: "Knowing there's no way I could fail, I would...."

(13) This space is for you to address anything else you may wish to share with me:

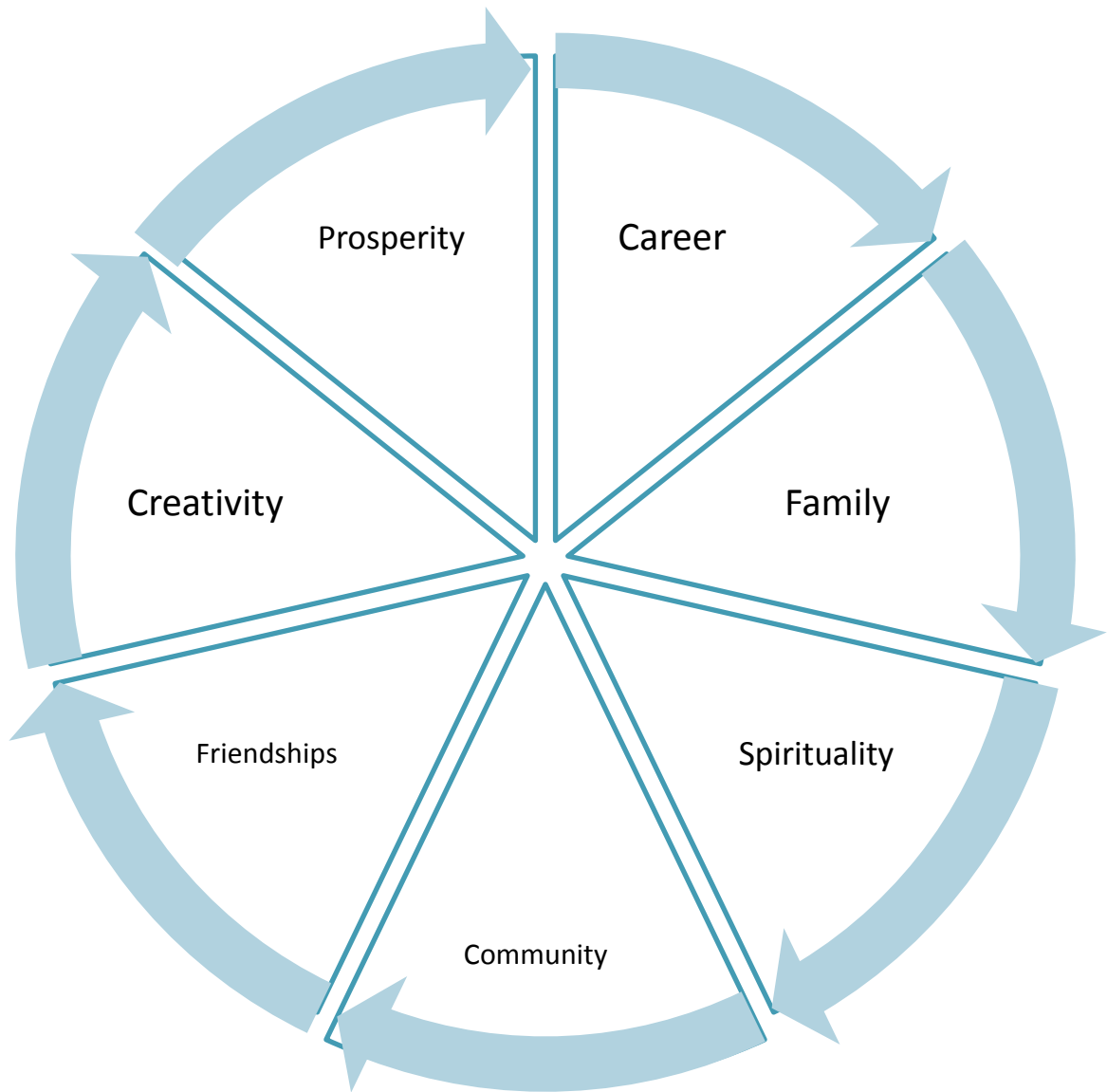
**VALUES IDENTIFICATION:** Spend some time reviewing the following list of qualities and values. Which ones resonate the most with you? Which are most important in your personal and professional life? Select as many as you want. Add any words to the list that are important to you.

Abundance	Competition	Exhilaration	Inspiration	Personal Growth	Sensuality
Acceptance	Completion	Expansion	Integration	Persuasion	Serenity
Accomplishment	Conformity	Expert	Integrity	Planning	Service
Accuracy	Congruent	Faith	Intentionality	Playfulness	Sincerity
Achievement	Connection	Family	Intimacy	Pleasure	Solitude
Action	Contemplation	Feeling	Intuition	Power	Space
Adventure	Contentment	Flexibility	Invention	Preparation	Spirit
Aesthetics	Contribution	Focus	Judgment	Privacy	Spirituality
Alignment	Control	Forgiveness	Justice	Process	Spontaneity
Altruism	Courage	Freedom	Laughter	Professionalism	Stimulation
Artistic	Creativity	Fun	Leadership	Prosperity	Strength
Assistance	Dedication	Glamour	Learning	Quest	Superiority
Attainment	Delight	Grace	Love	Question	Synthesis
Augment	Dependable	Gratitude	Loyalty	Radiance	Tenderness
Authenticity	Devotion	Guidance	Magic	Realization	Thinking
Autonomy	Direct	Harmony	Magnificence	Recognition	Thoughtfulness
Awareness	Discernment	Health	Mastery	Refinement	Thrill
Awe	Discovery	Holistic	Movement	Reflection	Touch
Balance	Divinity	Honesty	Mysticism	Relationship	Transformation
Beauty	Drama	Honor	Nature	Religious	Trust
Bliss	Dream	Hope	Nurture	Resilience	Truth
Boldness	Educate	Humor	Openness	Respect	Understanding
Bravery	Elegance	Image	Orderliness	Responsibility	Uniqueness
Calm	Empowerment	Imagination	Originality	Reverence	Unity
Candor	Empathy	Improvement	Partnership	Risk taking	Vision
Choice	Encouragement	Independence	Patience	Romance	Vitality
Clarity	Energy	Individuality	Peacefulness	Safety	Vulnerability
Comfort	Enjoyment	Influence	Perception	Satisfaction	Wealth
Commitment	Enlightenment	Information	Perfection	Security	Wholeness
Community	Entertainment	Ingenuity	Performance	Self expression	Will
Compassion	Excellence	Inquisitive	Perseverance	Sensation	

Of the values/qualities you've selected, which are your top ten most important? Of those top ten, which are the four MOST important, "couldn't live without" values?

## Wheel of Life

We will fill this out together in our initial session.



What's missing? \_\_\_\_\_