



**Prospective Coaching Client Intake Form of The WellBeing Academy, LLC**

**Return to: "L.A." by email: [yourwellbeingmatters@gmail.com](mailto:yourwellbeingmatters@gmail.com) or secure fax: 713.422.2428**  
(A secure email portal is also available & will be provided if you choose to use it. Just ask us.)

From: (Client) \_\_\_\_\_ Today's Date: \_\_\_\_\_

**Here's a list of my priorities for coaching/training/mentoring & some more info about me.**

1a. I want to create the following possibilities over our first month of working together

A. \_\_\_\_\_

B. \_\_\_\_\_

1b. I want to resolve or eliminate the following problems or challenges:

A. \_\_\_\_\_

B. \_\_\_\_\_

2. I want to improve the following skills or expand/use these talents:

A. \_\_\_\_\_

B. \_\_\_\_\_

3. I want to eliminate or minimize the following energy drainers or life-hassles:

A. \_\_\_\_\_

B. \_\_\_\_\_

4. I want to accomplish the following measurable or observable results:

A. \_\_\_\_\_

B. \_\_\_\_\_

5. At this point, I think that I'd like to make these fundamental changes or shifts in my beliefs, thinking, behaviors and mindset:

A. \_\_\_\_\_

B. \_\_\_\_\_

6. What I need most from you, as my mentor, trainer or coach, includes:

A. \_\_\_\_\_

B. \_\_\_\_\_