

Welcome to *Sacred Roots Holistic Coaching* - four little words that express my passion for life, relationship and recovery coaching. I appreciate your interest, and I am excited to tell you all about it!

Coaching is a powerful process, one that can help you claim (or reclaim) your own life: to find your voice, to take a positive action and to improve your own emotional equilibrium. Coaching is also a progressive journey, one that begins with clarifying steps. In that spirit of clarity I have designed this welcome packet to shed some light on my coaching practice:

- By way of INTRODUCTION, I'll address some common questions about **coaching in general**.
- By way of INVITATION, I'll give you a glimpse into **my coaching specifically** - who I am, where I've been, why I'm coaching and what I have to offer my clients.
- Finally, by way of INVOCATION, I'll close with my *Eleven Words for Sacred Roots Holistic Coaching*. I wrote them to express my passionate convictions on behalf of **EVERY** person.

THAT PERSON IS YOU.

**Supportively Yours,**

*Jessica*

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# 1 - introduction

## 1.1 WHAT IS COACHING?

Simply put, coaching is a collaborative partnership. Like any good partnership, it's purpose is met when both parties invest something - something valuable, something quantifiable and something altogether unique.

In coaching, **the CLIENT** provides three things the coach doesn't possess and cannot manifest unilaterally:

1. Ownership of the client's own choices
2. Awareness of the client's own experiences
3. Expertise about the client's own life.

In coaching, **the COACH** provides three things the client doesn't possess and cannot manifest independently:

1. An outside, observational perspective
2. Professional "support role" training
3. Techniques designed to help each client help themselves.

## 1.2 WHAT IS THE COACH'S ROLE? WHAT IS THE CLIENT'S ROLE?

Every coach defines this a bit differently. Here's my perspective: As a client, you enter our relationship ready to work it (it isn't easy), ready to play (we will laugh, I promise!) and ready to make some very real progress toward your goals. As a holistic coach, I enter our relationship prepared to support you (you are not alone), prepared to champion you (we've both trained for this!) and prepared to help you recognize and celebrate your progress.

## 1.3 WHAT KIND OF ISSUES PROMPT PEOPLE TO SEEK COACHING?

You name it, people got it. We humans are brilliantly successful at caring for others - while simultaneously ignoring our own needs for far too long. Most coaching clients are very high functioning; we thrive for our families, and we expertly manage the outward aspects of our lives. Life plays out as "normal", until one day, some major change (positive or negative) occurs. This event "shakes up" our external reality - and suddenly, as the result of this shift, a new internal space is created. That space begins to ache for acknowledgement or assurance, longing for attention to some need that isn't being met. From within this new space, something magical begins to happen: we rise up, with fresh motivation to dust off issues, rekindle passions and renew a connection to your own life - all within the context of this "new normal".



## **1.4 HOW IS COACHING DIFFERENT THAN THERAPY?**

Coaching and therapy are “separate-but-equal” fields of personal and professional work. The clearest distinction is also the most simple: Coaches do not diagnose or treat mental health disorders. Here’s another: Therapy often involves a journey through your past, seeking to discover what circumstances led you to your present reality. By contrast, coaching begins with your present reality. It clarifies where you are today, considers where you want to go, Then strategizes your best path to get there. Some clients benefit from working concurrently with a coach and another support team member (therapist, clergy member, mentor, or sponsor).

## **1.5 HOW IS COACHING DIFFERENT THAN SPONSORSHIP?**

Twelve Step fellowships (non-professional recovery groups that support addicted individuals and their loved ones) encourage new members to get a sponsor – a fellow member who has “been there, done that and lived to tell about it.” Sponsors guide sponsees through the Twelve Steps, suggesting how they solved similar problems through their experiences, all within the framework of a traditional Twelve Step recovery community. Sponsorship is a non-professional, non-regulated and non-monetary relationship, it’s anchored by the sponsors personal experience, and it doesn’t require professional qualifications. By contrast, coaching is a professional and paid relationship; it may integrate the coaches personal experience but it’s anchored by the coaches training skill set and methodology.

## **1.6 IS THIS COACHING THING A LIFE-LONG PROCESS?**

Not in my book! Believe it or not, coaching is often considered “successful “ when the experience reaches its natural end. Because each client is unique, there is no generic timetable for the coaching process. Many coaches ask for a 90 day commitment from clients, then review the situation progressively beyond that.

Here’s how I see it: I consider it my ethical responsibility to help my clients recognize their own personal progress. I teach my clients to measure their process with tangible milestones – including the milestones that indicate when our coaching relationship has fulfilled its intended purpose.

## **1.7 HOW DO COACHES HANDLE LOGISTICS?**

Coaching is a remarkably flexible profession. Some coaches prefer to work in traditional offices, seeing clients face-to-face. Others (like myself) coach exclusively by telephone, video chat, and email. Some coaches are public speakers, teach workshops or facilitate groups. Some coaches offer daily support, on-call services and emergency sessions.

This “flexibility factor” is practical and beneficial, both for the client and for the coach. Yet with all these variables one thing is of paramount importance: that YOU – the client - Feel comfortable, safe and personally supported. You deserve to grow in ways that accommodate your preferences, learning style and schedule. As you consider hiring me as your coach, I encourage you to speak up for what suits you best. Ask for what you need. I’ll provide it if I can, or refer you to someone who might be a better fit.

## 1.8 WHERE DO I EVEN BEGIN?

Toward the beginning of our work together, I often ask new clients to prioritize their needs within these four primary areas – choosing to start with one that feels the most urgent and/or important. These four areas prove to be remarkably inclusive, so I've begun to refer to them as my four "coaching cornerstones" read through the list and see if one jumps out at you:

Clarity: "I need to figure out what's happening in my life. I also need to figure out how I want to handle it."

Confidence; "I'm beaten down. I am just empowered. I'm not sure I have what it takes to rise above all this stuff."

Courage; "I know I need to (\_\_\_\_\_) fill in the blank, but I am seriously afraid of what will happen if/when I do."

Conviction: "Once upon a time, I knew what I believed - about life, love, humanity, faith, the world and my place within it. Now, very little feels solid/secure. Will any of my convictions survive this experience? Or do I really need to go back and start from scratch?"

Imagine a world where love is the guiding force,  
where the unique gifts that each individual brings receive honor and respect,  
where all are nurtured in allowing their gifts to blossom,  
to manifest the joy of living in each moment...

Imagine a world where all of nature is also honored,  
so all may live in harmony and share an increasingly vibrant  
and beautiful environment...

What we imagine we can create, starting in this moment.

This vibrant world will come into being as each of us empowers ourselves  
to live the dream now and share it with others.

Playing a part in the creation of this dream is the mission of Sacred Roots Holistic Coaching.  
In this dream, there is no poverty, because everyone is nurtured and loved. This love also eliminates  
the focus on fear and separation as we bridge the divisions created by race, creed, and national  
borders to co-exist together in harmony. The environment synchronously benefits everyone, as  
people all over the world shift their focus to a more holistic approach that creates balance rather than  
congesting our home planet with chemicals and toxic fumes.

Increasing our connections with our wholeness, which we may experience as simply Oneness,  
bringing us closer to making this dream a reality. We have an inherent connection with divine  
order. As we evolve spiritually, we unite more with our inner wisdom, which, in turn, strengthens  
our connection with all-that-is. This evolutionary quest is an upward spiral, taking us to higher  
levels of consciousness and wholeness



# 2 - invitation

## 2.1 WHO I AM AND WHERE I'VE BEEN

My name is Jessica, and I am utterly, hopelessly, head-over-heels in love...with my job!

I work full-time as a life coach and energy worker, with advanced training in trauma, relationships, and addiction. Within this field, I combine 15 years of personal and professional experience, “down in the trenches” with others, reeling and healing together from the impact of difficult experiences/traumas.

For the past 20 years, I've walked through various life and relationship experiences. I've been married and divorced. I've been independent and codependent. I've lived within relationships fueled by passion and anchored by commitment - yet complicated by addiction and depression. I've struggled to hold onto myself within these relationships, often dismayed at the aftermath of my own self abandonment. I've worked through years of therapy, coaching, mentorship and sponsorship. I've healed my own hurts. I've developed my own boundaries. I've even found my own grown-up, indoor voice. It hasn't been easy, but along the way I've encouraged myself with one simple fact; every single one of these experiences, from the most joyful to the most painful, has proven to be fundamentally transformational. Each experience has contributed something of substance to my life – and by extension, to my work in this field – broadening my perspective, increasing my understanding and deepening my capacity for genuine empathy.

Come to think of it, “Who I Am” is mostly the result of challenges I didn't intentionally choose for myself; jobs I didn't seek, losses I didn't expect, pain that I absolutely DID NOT want to experience. Realistically, my life hasn't played out according to Plan A. Instead, somewhere along the way, I actually began to embrace Plan B. Today, I realize that I genuinely LOVE this life - not the one I imagined once upon a time. I certainly haven't “arrived”, and I don't know what comes next. But no matter what tomorrow brings, I know that I can rally the resources I need, to meet it with grace and to make it count.

Hmmmm.... I might call that Plan C.

## 2.2 WHY AM I COACHING?

The basic answer it's really quite simple: I coach because I'm DONE sitting on the sidelines, watching others struggle to get their own lives back. In my experience, when something happens to interrupt (or obliterate) a person, "life as they know it" they usually cannot get through it by themselves – despite the fact that there and (everyone around them) expects that he/she can, should and will. Feeling disoriented a person needs to lean on someone supportive objective and empathetic – someone who can help clarify the fact and except the truth, reflecting that reality without denial. They need reassurance from someone who believes that their emotional hemorrhage will not last forever. Most importantly a person needs someone to "hold out hope" on their behalf – someone who can fast-forward through his/her current trauma, trusting in what is possible for them on the other side.

The reality of this "new normal" is what prompted me to name my practice Sacred Roots Holistic Life Coaching. While I do believe that we can (and do) "get our lives back", I also believe that life as we've known it will simply never be the same – that our emotional landscape has changed forever, that we CANNOT return to a former way of doing and being. This reality is sobering, and it sometimes takes a while to except. Ultimately, we CAN put this truth to good use – becoming deeper, more grounded and more authentic people.

I've had LOTS of formal coach training – and it's that education that qualifies me to practice in a professional capacity. That training is what equips me, but it isn't what drives me. From my deepest, most passionate place, I do this work because I lived it AND because I believe in it. **By seeking support from others, I have gotten my own life back – and that's the greatest testament I can possibly offer to my clients.** As a Holistic life coach, I am privileged to provide passionate and qualified support to my clients – inviting them to focus on getting their own lives back, providing an invitation of hope for their futures.

So, that's who I am, where I've been and why I am coaching. I am excited! Are you?

## 2.3 IT WORKS... BUT IT IS WORK!

Coaching can be fun, exciting and inspiring. But much of the time, it's also hard work. People don't hire me to water-down the truth, to dumb-down reality, or to offer pretty platitudes. As your coach, I am committed to serve your best interest, and sometimes I may not you out of your comfort zone. Here's what that looks like:

- I will ask you to make commitments – to yourself and to me – to practice new skills and habits between sessions. I will only ever ask for commitments we both agree you can handle. Let this be one relationship where accountability meet gentleness and authenticity.
- I will always be honest with you. At times, this may involve saying things you'd prefer not to hear. I will do my best to balance directness with sensitivity. I encourage you to be equally honest with me. Let this be one relationship where you can experiment, taking new risks and exploring new ideas.

When you're going through something painful, will proceed gently, not aggressively. Will create time and space to facilitate your healing, at your pace. Will also practice techniques that get you to a stronger less fragile place.

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## 2.4 POSITIVE ENVIRONMENTS

When it comes to personal healing and growth, positive environments are an ABSOLUTE MUST. I believe this principle deeply, and that's why I've echoed it into the very framework of Eleven Words. As a coach, I work to create a safe and productive environment for my clients, one that facilitates your progress and honors your process. I've learned these Eleven practices from other people (My own coaches, therapist, mentors and sponsors). I am now on her to practice them with you, in hopes that you will "pay them forward quote – first toward yourself, then also toward others.

- I will **listen** to you – not to judge you, but to understand you. I believe you deserve to be heard.
- I will **validate** you. Your experiences are legitimate, and your feelings deserve to be meaningful he addressed.
- I will **emphasize** the importance of self-care; it's a full-time job that only you can do.
- I will **help** you clarify your own internal convictions – yours, not anybody else's.
- I will **motivate**, champion and compel you. That means, I'll hold you to your own standards.
- I will **urge** you to establish an effective and accessible support network.
- I will **ask** you "the tough questions". I will invite you to practice gut-level honesty.
- I will **expose** you to a broader spectrum of tools and resources, prompting you to discover which suit you best.
- I will **encourage** you to be yourself. I believe that sometimes, you NEED to "just be".
- I will **remind** you, as often as necessary, that you CAN get your own life back.
- I will **believe** the *Eleven Words* on your behalf – until you can experience them fully for yourself.



## 2.5 LET'S GET STARTED!

Hopefully by now, I've answered your questions about coaching (in general) and my own practice (specifically). I hope you're excited to move forward with the process! To kick off our potential client/coach relationship, I'll ask you to do four things right off the bat:

1. **Read this *Welcome Packet* in it's entirety**, including PART TWO: Policies & Paperwork. If you have any questions about any of this material please don't hesitate to ask. You can email me in advance or address them during our call.
2. **Book/schedule your complimentary 45 Minute Connection video call.** That first 45 minutes is my gift to you. It also serves as an exploratory interview between us, ensuring that we're on the same page before your first paid session. Book Online and let's get this party started!
3. **After our connection call session, if you're ready to formally hire me as your coach, please print and sign the applicable forms:**
  - Coaching Agreement on page 14
  - Payment Authorization Form on page 15
  - Client Contact Form on page 16
  - Release of Information Form (optional) on page 17
4. Type or write your answers to PART THREE: Getting To Know You! (Pages 22– 25) These answers to these questions/exercises will serve to focus and inform our coaching work from your first session forward.

**Together, these steps will enable us to hit the ground running, ensuring that we begin coaching from the best possible starting place. Including our connection call session, these four tasks should take less than three hours. Consider this time your initial investment in your coaching journey. You're worth it!**

**Note:** Please print, complete, scan/photograph and email your forms to me, (jessicamiddleton01@gmail.com) send them via text message to [952-594-1408](tel:952-594-1408). I'll add my own signature to the coaching agreement then return it back to you ASAP.

# 3 - invocation

## Eleven Words by Jessica

- Everyone deserves honesty. We deserve to be honest with ourselves first and foremost. We deserve to experience the internal reward of speaking truthfully about our own reality. We also deserve to hear truth from others, establishing environments of authenticity within our relationships.
- Everyone deserves to be heard. We deserve to express our unique voice to others, with an environment where our words are valued and validated. We deserve to receive acknowledgment from others, to know that our words are genuinely absorbed, accurately reflected and meaningfully addressed.
- Everyone deserves to be comforted. We deserve “a break” from being “the strong one”, experiencing environments where in we can be transparent and vulnerable – angry, overwhelmed, conflicted, needy, fragile, afraid, insecure and uncomposed.
- Everyone deserves empowerment. We deserve to access our internal realities, needs, boundaries, spiritual beliefs and sources of strength. We deserve to exercise our empowerment progressively and imperfectly, within environments of trial-and-error, evaluation and exploration.
- Everyone deserves choices. We deserve freedom to navigate our healthy and unhealthy realities, making intentional choices to “live with”, “leave behind” or “lobby for change” within those realities. We deserve to make decisions within pressure-free environments, space that allows us to choose differently – to make “course corrections” - along the way.
- Everyone deserves to experience their own healing, independent from the needs of their significant other or family of origin. We deserve to pursue support for ourself, in our own way and for our own sake. We deserve to heal within safe environments that answer our questions, address our needs and advocate for our role within our own life.
- Everyone deserves healthy relationships. We deserve to integrate with others, connecting in ways that are neither self – subsisting (isolated) nor codependent (enmeshed). We deserve to practice healthy relationships at our own pace, within environments that empathize with the complexity of human experience.
- Everyone deserves to love themselves. We deserve to believe that we are more than our body our mind, our family, our faith, our career, our mistakes and/or our accomplishments. We deserve to explore this within environments of others who believe in our behalf, until we are able to experience it fully for ourselves.
- Everyone deserves to nurture them self. We deserve to invest time, energy and money into things that suit or inspire our soul. We deserve to enjoy these gifts without guilt, within environments that prioritize our happiness and wholeness.
- Everyone deserves healthy boundaries. We deserve to establish thresholds that protect and empower our well-being, providing environments of emotional safety and personal space. We deserve to adapt and redefine our boundaries when needed, adjusting them to improve our life as it unfolds and evolves over time.
- Everyone deserves a fresh start. We deserve to renew, reclaim and re-orient our story, without judgment or pre-supposition. We deserve to discover our purpose and promise, within environments that fully support our visions for “life “.



# part two:

## *policies & paperwork*

- To Read: The Business Bits...
- To Read + Sign + Return: Coaching Agreement ...
- To Read + Sign + Return: Payment Authorization Form ...
- To Read + Sign + Return: Client Contact Form...
- To Read + Sign + Return: Release of Information Form (optional)...

## THE BUSINESS BITS

### FEES: Sacred Roots Holistic Life Coaching Affordable Pricing

#### Join a membership or pay as you go.

Forget about breaking the bank in order to hold onto your sanity.

Sacred Roots Holistic Life Coaching offers you our popular monthly memberships or pay as you go options. Monthly subscriptions are discounted for members to reward them for their continuous use of coaching. They also benefit from an automatic deposit of credits in their account each month so they never fall behind on their progress!

If you're needing some extra help on a particularly hard month, or don't have the time to fully commit, take a look at our pay as you go options.

#### Monthly Life Coaching Memberships

Discounted membership credits to keep life coaching convenient and affordable.

2 credit = 1 Sacred Email

4 credits = 1 60 Minute Video Session

**\$179/mo** (\$89.50/E-mail)

#### The Touch-Up

4 monthly credits

For those who are scaling back from coaching but want to hold onto well-deserved results, or for those who have a tightly-packed schedule, and enjoy writing vs speaking, the Touch Up is for you.

- **2 Sacred Emails**

**\$249/mo** (\$124.50/online session)

#### The Essentials

8 monthly credits

The most popular package! Chat with Jessica bi-weekly to unwind, meet goals, master self-acceptance and maintain momentum throughout your self-discovery journey.

- **2 (60 minute) video sessions**

**\$349/mo** (\$87.25/online session)

#### The Makeover

16 monthly credits

If you are tired of living in the same old patterns and feel fed up with your typical way of life, then you need this plan. Schedule hour long weekly calls!

- **4 (60 minute) sessions**



## Pay As You Go

**\$99**

### **Sacred Email**

Purchase one credit for a Sacred Email. Write out as much as you'd like and Jessica will provide a thoughtful response within 48 hours. Submit entry via phones, tablets, desktops, or whatever method you prefer.

**\$150**

### **Video Session**

Purchase four credits for an hour (60 minute) video session. Schedule a session within Jessica's availability.

I acknowledge that full payment is due BEFORE the start of every coaching session, and that each payment serves to confirm and secure my scheduled appointment.

**Payments:** I process my billing exclusively through PayPal, using this link: [PayPal.me/Jessica/ Middleton](https://PayPal.me/Jessica/Middleton). This enables clients to pay by credit card, debit card or bank account. To create a PayPal account, visit [PayPal.com](https://PayPal.com).

**Scheduling:** In most situations, it's ideal to schedule evenly spaced sessions, once per week, for at least the first 6 to 8 weeks of coaching. Some clients prefer to book bi-weekly appointments, while others schedule two sessions every week. I am more than happy to discuss YOUR unique needs in this area, so please be brave and ask for what suits you best!

**Rescheduling:** Life doesn't always happen as planned. Rescheduling is sometimes necessary, and that's OK. I do request 24 hours notice to cancel appointments, except for emergencies. I will strive to provide you the same courtesy.

**Missed or Late Sessions:** When we schedule your coaching sessions, I consider that time reserved for YOU. I will be prepared, present and available, during that entire time slot. If you miss an appointment without advance notice, I consider that time spent: I do not provide a refund or credit. If you arrive late to an appointment, we can begin at that point – but we cannot extend beyond the pre-scheduled session and time.

**Confidentiality:** Because trust and intimacy are vital to coaching, it's important to me that you feel safe sharing details about your own life. As your coach, I am committed to practice VERY HIGH standards of confidentiality. I am prepared to hear your truth, whatever it is – and it will remain safely in my professional care.

**Referrals:** Of course, I appreciate them! You are welcome to share my name, phone number, website, and email address. Most importantly, remember this; if an acquaintance of yours should EVER become my client, I will NEVER discuss your story with them or vice versa.

**Release of Information Form: (Optional)** I invite you to complete this form if you want me to consult with another member of your professional support team (therapist, counselor, clergy member, medical doctor, attorney, etc). This form is entirely optional, and you may provide or with dry at any future point.

## COACHING AGREEMENT

AS A CLIENT, I commit to the following:

- I have read and understand this entire *Welcome Packet*, including PART TWO: Policies & Paperwork (Pages X - X)
- I will read, complete and return my answers to PART THREE: Getting To Know You! (Pages X-Z) before our first paid session, if at all possible.
- I will fulfill the amount and terms of payment, as outlined by the Payment Authorization Form. (Page v)
- I will actively value this process – to be punctual, respect full and truthful, to the best of my ability.
- I will bring my best to our coaching relationship – I will participate fully, practice new skills, complete my assignments and keep my commitments. I am aware that investing less than my best will diminish the positive impact of this experience.
- I understand the nature of this coaching relationship, including the imperative value of making my own personal choices. I acknowledge that I alone am responsible for myself: This includes any actions I take or don't take as a result of our coaching relationship. I hold my coach, Jessica Middleton, harmless from all legal action relating to this coaching relationship, it's services and it's recommended resources.

Client

Name: \_\_\_\_\_

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

AS A COACH, I commit to the following:

- I will honor your current reality Dash without judgment or blame or shame.
- I will partner with you, exploring new ways to reclaim yourself and strengthen your emotional well-being.
- I will actively invest my best experience, education, skills and resources into our coaching relationship, and I will inform you of external resources that may support you're learning, healing and personal growth.
- I will respect you by demonstrating punctuality, flexibility and reliability. I will practice high standards of confidentiality and professionalism, across our entire coaching relationship.
- I will support you, champion you and challenge you. I will coach you to advocate for yourself, within your own life and relationships. I will occasionally make specific requests of you, (including homework) to facilitate your progress between sessions and maximize our coaching time.
- **I will clearly state I am NOT qualified to diagnose or treat medical or psychological conditions.** If you experience medical or psychological issues, now or in the future, or should they become factors that impact our coaching relationship, it is critical that you probably seek the proper professional assistance.
- I will firmly adhere to the code of ethics as outlined by The International Coach Federation. You can review this code at [www.coachfederation.org/ethics](http://www.coachfederation.org/ethics).

Coach Name: **Jessica Middleton**

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



## PAYMENT AGREEMENT

I commit to pay the following fees as designated:

I understand that Jessica Middleton receives payment through PayPal, using this link; [PayPal.me/jessica](https://www.paypal.me/jessica) Middleton. This enables client to pay by credit card, debit card or bank account. If I do not have a PayPal account, I will create one before my first session ([PayPal.com](https://www.paypal.com)). I acknowledge that full payment is due BEFORE the start of every coaching session, and that my payment service to confirm and secure my appointment.

If I miss an appointment without advance notice (24 hours), I will not expect a refund or credit.

Client Name: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# CLIENT CONTACT INFORMATION:

Full Name: \_\_\_\_\_ Time-Zone: \_\_\_\_\_ Age \_\_\_\_\_  
Street Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Preferred Email: \_\_\_\_\_ ☐ Permission to use this email for coaching correspondence?  
Preferred Phone Number: \_\_\_\_\_ ☐ Home Phone ☐ Cell Phone ☐ Work Phone  
Alternate Phone Number: \_\_\_\_\_ ☐ Home Phone ☐ Cell Phone ☐ Work Phone  
Permission to use your preferred phone number for coaching correspondence? ☐ Okay to Call? ☐ Leave Voicemail? ☐ Text Message?  
Permission to use your alternate phone number for coaching correspondence? ☐ Okay to Call? ☐ Leave Voicemail? ☐ Text Message?

## FAMILY AND ROMANTIC RELATIONSHIPS (please check all that apply):

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> I am currently married. | <input type="checkbox"/> I am currently divorced.        | <input type="checkbox"/> I was divorced (past).  | <input type="checkbox"/> I am planning to divorce (in process). |
| <input type="checkbox"/> I am casually dating.   | <input type="checkbox"/> I am in a serious relationship. | <input type="checkbox"/> I live with my partner. | <input type="checkbox"/> My partner and I are engaged.          |
| <input type="checkbox"/> I have young children.  | <input type="checkbox"/> I have grown children.          | <input type="checkbox"/> I have no children.     | <input type="checkbox"/> My children do not live with me.       |

## CURRENT SUPPORT RESOURCES (please check all that apply):

- |   |  |   |                                      |
|---|--|---|--------------------------------------|
| <input type="checkbox"/> individual therapy   | <input type="checkbox"/> group therapy           | <input type="checkbox"/> couples therapy      | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> individual coaching  | <input type="checkbox"/> group coaching          | <input type="checkbox"/> couples coaching     | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> twelve step meetings | <input type="checkbox"/> twelve step sponsorship | <input type="checkbox"/> faith-based recovery | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> spiritual direction  | <input type="checkbox"/> spiritual counseling    | <input type="checkbox"/> online support group | <input type="checkbox"/> other _____ |

## CURRENT MEDICAL/MENTAL HEALTH ISSUES (please check all that apply):

- ☐ I am currently being treated by a therapist, doctor or mental health specialist.  
☐ I am receiving treatment for this/these condition(s): \_\_\_\_\_  
☐ I prefer to discuss this during our first session.  
☐ I prefer not to share this information.

## IS THERE ANYTHING ELSE YOU WANT ME TO KNOW ABOUT YOU?

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**EMERGENCY CONTACT:** Please note: I will ONLY use this emergency contact information in the event that I am unable to reach you and/or am severely concerned about your personal wellbeing. Your privacy and autonomy are extremely important to me; I will always respect and protect those principles, even under emergency contact circumstances.

Name: \_\_\_\_\_ Relationship to Client: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_



## RELEASE OF INFORMATION (ROI)

I (client) give my permission to Jessica Middleton, **to discuss, disclose and/or exchange information** (verbally and/or in writing) from our coaching sessions, relationship and related correspondence, to/with that individual and/or institution indicated below, per professional and ethical discretion.

This release also authorizes Jessica Middleton **to receive information** related to my communications (verbally and/or in writing) with the individual and or institutions indicated below, also per professional and ethical discretion.

**This permission is for the singular purpose of improving my coaching and or clinical care experience, healing process and relational growth**, by co-creating an collaborative partnership between myself and another member I have my professional care team.

**I understand my right to decline this permission.** I retain full authority to revoke this permission (by written notice) at any time. I understand that replication is not valid to whatever extent Jessica Middleton has already acted in reliance upon my previous authorization.

Name of Practitioner to Release Information: \_\_\_\_\_

Practitioner' Relationship to Client: \_\_\_\_\_

Practitioner's Address (if known): \_\_\_\_\_

Practitioner's E-mail Address: \_\_\_\_\_

Practitioner's Phone Number: \_\_\_\_\_

Client Name: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# part three:

## *getting to know you!*

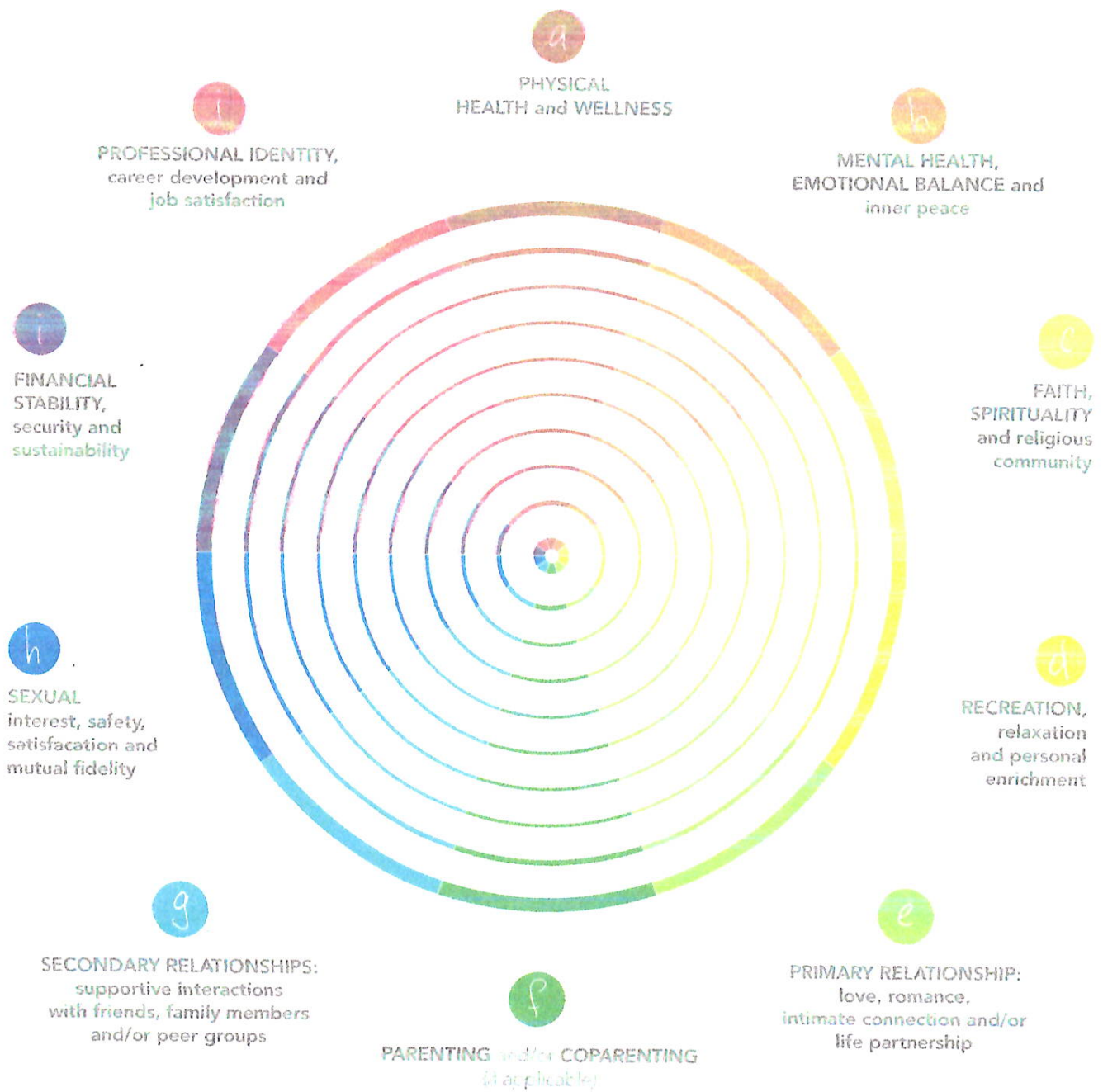
- To Read + Complete + Return: Wheel of Life Exercise
- To Read + Complete + Return: Coaching Cornerstones Survey
- To Read + Complete + Return: Client Connection Questions



For this exercise, use a pen or pencil to fill in each of the ten sections highlighted below.

10 = "I'm completely satisfied. This area of my life is working beautifully, with zero need for improvement."

0 = "I'm deeply unsatisfied. This area of my life is NOT working well, and I can see significant need for improvement."



## COACHING CORNERSTONES SURVEY

- a) Please read these four primary areas "Coaching Cornerstones", below.
- b) Consider where your current needs and priorities lie.
- c) Number the list in order of urgency and/or importance.
- d) Record your reflections on page zz

\_\_\_\_\_ CLARITY: I need to figure out what's happening in my life. I also need to figure out how I want to handle it.

\_\_\_\_\_ CONFIDENCE: I'm beaten down. I'm disempowered. I'm not sure I have what it takes to rise above this "stuff".

\_\_\_\_\_ COURAGE: I know I need to (fill in the blank), but I'm seriously afraid of what will happen if/when I do.

\_\_\_\_\_ CONVICTION: Once upon a time, I knew what I believed - about life, love, humanity, faith, the world and my place in it. Now, very little feels solid or secure. Will any of my convictions survive this experience? Or do I really need to go back and start from scratch?



*almost done!*

# CLIENT CONNECTION QUESTIONS

COACHING IS A DEEPLY PERSONAL PROCESS.

So, before we hit the ground running. I'd like to know a few more things about you! Your answers to these questions will give me an overarching idea of where at, and how that compares to where you'd like to go next. **Please answer with as much honesty and detail as you can - but also feel free to skip any questions that overwhelm you or you simply don't feel relevant.** If possible please send me your answers at least two days before our first coaching session.

## PART A = THE SWEET STUFF

**(A1) What parts of my life are “working” for me right now?**

Example: I actually really like my job. It’s one place where I feel productive and appreciated and rewarded.

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**(A2) What, if anything, am I involved in that is greater than myself? Any particular faith/religious orientation?** Example: I’m passionate about the environment, so every year I organize our local recycling event.

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**(A3) What (if anything) do I do for fun, relaxation, enrichment or stress relief?**

Example: Every Friday night , I curl up and watch Netflix until I fall asleep.

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**(A4) I’m thinking of someone who knows me intimately-the truest, most authentic me. What three to five adjectives would that person use to describe me at my personal BEST?**

Examples: comforting, optimistic, beautiful, wise, caring

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**(A5) What are 1 – 3 unique things I contribute to the world me?**

Example: My sense of humor makes people laugh. I’m a really good mom. I often compliment strangers, just to brighten their day.

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**(A6) What dreams for my life have come true?**

Example: I always longed to be a mo; after four miscarriages, I finally have my daughter.

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## PART B = THE TOUGH STUFF

**(B1) What parts of my life are NOT “working” for me right now?**

Example: I currently have NO time for myself. I spend 24 hours a day taking care of everyone else.

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**(B2) What, if any, are the greatest stressors (pain, fear, anxieties) I’m currently carrying.**

Example: If my partner leaves me, how will I support myself financially?

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**(B3) I’m thinking of someone who knows me intimately-the truest, most authentic me. What three to five adjectives would that person use to describe me at my personal WORST?**

Example: angry, patronizing, selfish, dismissive, lazy

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**(B4) What do I do when I feel angry, frustrated or powerless?**

Example: My first reaction is to blame everybody else for my distress. I typically isolate myself from others until I can calm down.

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**(B5) What parts of my life do NOT reflect the dreams I once held for it?**

Example: I did NOT expect to be unemployed; I thought my career would be 100% recession proof.

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**(B6) What important thing(s) are missing from my life? What void or sense of loss do I experience as the result? (Share as many as you wish, and please be specific as possible).**

Example: I miss feeling close to husband. Without that connection, I feel increasingly alone, lacking my friend and my parenting partner.

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## PART C = THE BIG PICTURE

**(C1) What major transitions have I experienced in the past (2) years?**

Example: My mom died 18 months ago. That same month, I was promoted at work. I left that job last week, due to conflicts with my boss.

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**(C2) During the next three to six months, what do I want to achieve (gain, change, improve, strengthen, learn, etc.)? In what meaningful ways would achieving these things improve my life? Share one to three answers (or more, if you wish) and please be as specific as possible.**

Example: I want to decide if going back to college is a good choice for me; I'm tired of changing my mind and need peace of mind to move forward, one way or another. I want to get better at expressing my needs to my husband, including my need for physical affection; I believe that if I can express my needs more clearly and confidently, I will stop blaming myself for the disconnect that's hanging between us.

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**(C3) Within the upcoming year, are there any specific calendar dates, events or milestones I'm anticipating with excitement, anxiety or other intense emotions?**

Example: My son graduated from high school on June 30, and I'm so proud of him! August 10<sup>th</sup> will be two years since the date I discovered my husband's affair. That's the same weekend as my annual family reunion, and I don't know if or how I'll be able to go.

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**(C4) As I review my responses to the *Wheel of Life* (Page ??), how do I feel about them? What insights do they give me?**

Example: I'm surprised to realize that I'm VERY satisfied with my parenting. That's easy for me to forget in the middle of everything else, I realize that I could give myself MUCH more credit in that area.

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## PART D = HELP YOU HELP ME!

**(D1) What prompted me to choose you as my coach? And/or, what reasons led me to coaching (instead of a different professional resource) for support at this time?**

Example: My therapist recommended you, and I liked the article on your website. I'm very independent, but also inconsistent- so I like the idea that coaching allows me to set my own goals, while providing me with tools to measure my progress and accountability.

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**(D2) What important thing(s) do I need MOST from you, as my coach? What suggestions can I give you, to help me help myself when I really need it?**

Example: I really need a non-judgmental zone, I also need someone to help me recognize red flags, at times when I'm prone to denial. When I'm really overwhelmed, please remind me to take life one Minute at a time.

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**(D3) Which tools or environments best facilitate my ability to learn, heal and grow? Which hinder my ability?**

Example: I'm a visual processor learner; if I observe something in action, I'll never forget it. As an introvert, I need alone time to internalize new ideas. I don't read much, it's my least favorite way to absorb new information. I need accountability to make progress in meaningful areas.

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**(D4) When I'm feeling stuck, discouraged or defeated, what's most likely to motivate or inspire me?**

Example: Even when I'm not sure what I want, I always know what I *don't want*. Remembering me puts life into a helpful perspective.

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**(D5) Which *Coaching Cornerstone* (Page ??) best represents where I want to focus FIRST in our coaching? As I review my responses to this survey, how do I feel about them? What insights do they give me?**

- ☐ Clarity
- ☐ Confidence
- ☐ Courage
- ☐ Convictions

**(D6) What else would I like you to know about me?**

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