



Tactical coaching for life, leadership, and legacy

## Client Welcome Form

I'm looking forward to walking with you during this season as you enter more fully into your unique plan for leadership and personal growth!

Following are a few guidelines we need to establish to make our working relationship as productive as possible. If you have any questions, please call me.

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### Procedure

- **Scheduled calls/Zoom meetings** need to be received on time. Calls/meetings will be roughly **30-45 minutes in length**.
- Please complete the enclosed 'Client Preparation Form' and **email it 24 hours prior to each call**. This allows me to be as prepared as possible to make the best use of your time.

### Calls

- Our agreement includes a set number of scheduled calls.
- If you or I am unable to keep a regularly scheduled call, we will compare calendars in advance and **book another time**.

### Changes & Cancellations

- Cancellations need to be made at least **24 hours in advance**.
- If you had a valid emergency causing you to miss a call, we will work around it.
- Otherwise, missed calls are **not made up nor refunded**.

### **Extra Time / Spot Contacts**

- You are encouraged to contact me between scheduled calls by **email, text or 'spot calls'** (~5 minutes or so in length).
- This is for questions, struggles, thoughts, praise reports, or just to touch base.
- These contacts are **included in your monthly fee**. Those who use this extra level of service tend to make greater progress.

### **Fees**

- Payment is made by **Visa, MasterCard, or American Express, or Venmo**.
- Payment is billed one or two business days prior to each month **unless other arrangements have been made**.

### **Follow-through and Problems**

- Our relationship needs to be based on absolute honesty with each other. If at any time you are dissatisfied with something, **please bring it up!** I will work with you to resolve any difficulties.
- It is imperative that you **apply yourself** if coaching is to be successful.
- Our work will sometimes be very purposeful, goal-directed, and dependent on you doing some **'homework'**. Other times, it will be broad in scope, requiring time for reflection, prayer, and meditation on your vision, goals, and plan for your life.
- Your real growth will come from the work you do in the time **between our calls**.
- I do not have all the answers you are looking for, but I will walk faithfully with you as you seek them. Check yourself now on the true measure of your commitment to that kind of pursuit.



## Client Intake Form

Coaching is more effective and efficient if you can give me some information about yourself at the beginning. This is confidential and you are free to pass on to any of the questions. The more you complete, however, the better I will know you and be able to provide the best coaching experience.

### 1. Client Information:

- **Name:** \_\_\_\_\_
- **Email:** \_\_\_\_\_
- **Phone:** \_\_\_\_\_
- **Preferred Contact Method:**  Email  Phone  Text
- **Best Times to Reach You:** \_\_\_\_\_
- **Marital Status:** \_\_\_\_\_
- **Spouse's Name:** \_\_\_\_\_

## 2. Background Summary

- **Current Role/Profession:** \_\_\_\_\_
- **Years of Experience:** \_\_\_\_\_
- **Are you or have you ever been in counseling or therapy? Y or N**
- **If yes, please explain:** \_\_\_\_\_

\_\_\_\_\_

## 3. Coaching Goals

- **What do you hope to achieve through coaching?**
- **How will you know coaching has been successful?**
- **What are you dealing with right now that needs immediate attention or resolution?**

## 4. Strengths & Challenges

- **What are your key strengths? What do you see as your personal and professional strengths & qualities?**
- **What current challenges or growth areas are most important right now?**

## 5. Support System & Resources

- **Who or what supports you in your leadership journey?**
- **What resources or habits help you maintain balance and resilience?**

## **6. Expectations for Coaching**

- **What do you expect from your coach?**
  
- **How can your coach best support you?**

## **7. Values & Goals**

- **What are the most important things (good and bad) happening in your life right now?**
  
- **What ways would you like your life to be different one year from now? Be specific.**
  
- **What's getting in the way of those goals?**
  
- **What are your hobbies/areas of interests/passions?**
  
- **What are 3 short-term benefits you intend to receive from our coaching relationship?**
  
- **What are 3 long-term benefits you intend to receive from our coaching relationship?**

- **How can I best coach you?**

## **8. Confidentiality & Consent**

*I understand that coaching is a confidential and voluntary process. My participation is based on mutual trust and respect.*

- **Signature:** \_\_\_\_\_
- **Date:** \_\_\_\_\_

## **8. Coach Notes (Internal Use Only)**

## **9. Final Note:**

### **Looking forward...**

Before you embark on this journey, consider the following questions:

1. Do you have places in your life that you would like to work but are not sure where to start?
2. How would life look different if you worked on these things?
3. Would you be willing to change where needed and do things differently?
4. Are you willing to “try on” new behaviors and address obstacles directly?

If these questions resonate with you, maybe coaching is a fit.

When complete, save and email ([sheepdogleadershipinfo@gmail.com](mailto:sheepdogleadershipinfo@gmail.com)) this form to your coach prior to your first session.



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### Client Agreement/Contract Form

This Coaching Agreement is entered into on this day of \_\_\_\_\_, between:

Coach: Sheepdog Leadership Wellness and Coaching, LLC (Referred to as "Coach" or "SLWC")

SLWC Phone: 616-254-7044

SLWC Email: sheepdogleadershipinfo@gmail.com

Client Name (Referred to as "Client"):

Client Address:

Client Phone:

Client Email:

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## 1. Coaching Relationship & Disclaimer

- **Nature of Coaching:** The Coach and Client agree to establish a professional coaching relationship. Coaching is a partnership focused on the Client's personal

growth, goal setting, and achievement. Coaching is not therapy, counseling, or professional advice (e.g., financial, medical, legal, or therapeutic). The Coach will not offer advice that is better handled by a licensed professional.

- **Client Responsibility:** The Client understands that coaching results are based on the Client's actions, commitment, and follow-through. The Client is solely responsible for creating and implementing their own decisions, choices, and actions.
- **Coaching/Client Relationship:** The client understands that coach is a relationship they have with their coach that is designed to facilitate the creation/development of personal, professional, and/or business goals and to develop and carry out a strategy/plan for achieving those goals. The client understands that coaching is a process that may involve all areas of their life, including work, finances, health, relationships, education, and recreation. The client acknowledges that deciding how to handle these issues and implement choices is exclusively the Client's responsibility.
- **Coaching Focus:** Could include, but not limited to the following: life skills, communication skills, life and business goals, financial management, life purpose work, transitions, limiting belief systems, and relationship skills and coach mentoring.
- **Disclaimer:** SLWC makes no guarantee or warranty that coaching will achieve the Client's goals, and the Client agrees to hold the Coach harmless from any liability for any action or inaction taken because of the coaching relationship. The Client understands and agrees that they are fully responsible for their wellbeing during the coaching calls, including their choices and decisions.

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## 2. Confidentiality

- **Policy:** The Coach agrees to maintain strict confidentiality regarding all information shared by the Client. All conversations, projects, or documents shared between coach and client are strictly confidential and will not be shared with any third party without the consent of the client.
- **Exceptions to Confidentiality:** Confidentiality does not apply to information that:
  - Is already in the public domain.
  - The Coach is required by law to disclose, such as credible threats of self-harm, harm to others, or illegal acts.
  - Is shared with a third party who is also bound by confidentiality (e.g., a supervisor or mentor coach).
  - The Client gives written permission to release.

### 3. Program and Fees:

Package	Frequency/Duration	Total Monthly Investment
<b>A</b>	<b>1 Zoom session per month</b>	<b>\$50.00</b>
<b>B</b>	<b>2 Zoom sessions per month</b>	<b>\$90.00 (\$45 per session)</b>
<b>C</b>	<b>3 Zoom sessions per month</b>	<b>\$120.00 (\$40 per session)</b>
<b>D</b>	<b>4 Zoom sessions per month</b>	<b>\$140.00 (\$35 per session)</b>

**\* Additional discounts are available for longer term commitments.**

- **Term:** This agreement is effective for a period of [            ] months/ sessions, commencing on [            ].
- **Fees and Payment:** The Client agrees to pay the total investment of \$            . Payment is due by the first of each month.
- **Payment Method:** Payments will be made via Credit Card, Debit Card, Bank Transfer, PayPal, or Venmo. The Client authorizes the Coach to charge the agreed-upon fees according to the payment schedule.

### 4. Scheduling and Cancellation

- **Scheduling:** Sessions will be scheduled by mutual agreement between the Coach and the Client.
- **Cancellation/Rescheduling by Client:** The Client must provide the Coach with at least 24 hour's notice to cancel or reschedule a session.
  - Sessions canceled with less than the required notice will be non-refundable.
  - Sessions missed without any notification ("no-show") will be forfeited and charged in full.
- **Cancellation by Coach:** The Coach will give the Client as much advance notice as possible if a session must be canceled and will reschedule the session promptly.
- **Punctuality:** If the Client is late for a session, the Coach will wait for the scheduled time, but the session will still end at the originally scheduled time.

## 5. Termination

- **Mutual Termination:** This Agreement may be terminated by mutual written agreement of both parties.
- **Unilateral Termination:** Either the Coach or the Client may terminate this Agreement at any time for any reason by providing **3 days** written notice to the other party.
- **Refund Policy Upon Termination:**
  - If the Client terminates the Agreement, the Client will be responsible for the cost of all completed sessions and any applicable early termination fees. Payment for the current month shall be considered payment-in-full for the coaching agreement unless there is an unpaid balance. In the event of fees owed at the time of cancellation, full payment is due and payable.
  - The Coach will refund any unused portion of prepaid fees, calculated at the agreed-upon session rate, within 30 days of termination.

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## 6. Mutual Understanding and Agreement

By signing below, the Coach and Client acknowledge that they have read, understand, and agree to the terms and conditions of this Coaching Agreement.

<b>Client Signature</b>	<b>Coach Signature</b>
<b>Client Printed Name</b>	<b>Coach Printed Name</b>
<b>Date</b>	<b>Date</b>



### **Client Preparation Form**

Preparing for your coaching session helps you get the most out of our time together. Please complete this form prior to each session. Reflect honestly and thoroughly — this is your opportunity to identify focus areas, celebrate wins, and recognize opportunities for growth. (To be completed and emailed to me the day **before** the coaching session)

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

**Date:** \_\_\_\_\_

**How are you today, right now? How has your week been?**

**What do you want to get out of our next coaching session?**

**What do you want to have clarity on by the end of our next session?**

**What actions have you taken since our last session? What were your wins and challenges?**

**What didn't you get done but want to be held accountable for?**

**What challenges are you currently experiencing, and how have you handled them so far?**

**What didn't you get done, but intend to accomplish**

**What shifts, awareness, or 'ah-ha' moments have I had since our last session?**

**What else would you like to share with me?**

**Coach Notes:**

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"Empowering you to live with clarity, conviction, and courage."



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## Client Meeting Reflections Form

**Lead from the Front. Live with Integrity.**

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**Name:**

\_\_\_\_\_

**Date of Session:**

\_\_\_ / \_\_\_ / \_\_\_\_

**Next Session Scheduled:**

\_\_\_ / \_\_\_ / \_\_\_\_

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**Purpose of This Form**

Use this form to capture your most valuable insights, breakthroughs, and commitments from today's coaching session. Reflection strengthens clarity, reinforces accountability, and helps you carry forward the progress you're making as a leader and as a whole person.

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## **1. Key Takeaways from Today's Session**

What stood out to you? What insights, strategies, or realizations felt most important?

## **2. Greatest Impact or Breakthrough**

What made the biggest difference for you during this session?

## **3. Shifts in Thinking or Perspective**

What mental shifts, reframes, or new perspectives emerged for you today?

## **4. Commitments Moving Forward**

What specific commitments, actions, or personal standards are you choosing as a result of this session?

## **5. Additional Notes or Reflections (Optional)**

**If you would like support in staying accountable, email [sheepdogleadershipinfor@gmail.com](mailto:sheepdogleadershipinfor@gmail.com) this completed form to your coach.**

**Sheepdog Leadership Wellness & Coaching, LLC**

*Lead from the Front. Live with Integrity.*





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### Authorization to Release Information

#### Client Information

- Client Name: \_\_\_\_\_
- Date of Birth: \_\_\_ / \_\_\_ / \_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_

#### Release To / From:

- Name / Organization: \_\_\_\_\_
- Address: \_\_\_\_\_
- Phone: \_\_\_\_\_ Email: \_\_\_\_\_

#### Information to Be Released (check as applicable):

- Coaching session summaries
- Attendance verification

- Progress updates (goals / action plan)
- Behavioral observations relevant to coaching
- Scheduling or participation information
- Other (please specify): \_\_\_\_\_

**Purpose of Disclosure:**

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**Important Limits & Understanding:**

- I understand that the information disclosed will be limited to **coaching-related content only**.
- I may revoke this authorization at any time in writing.
- Revocation will not affect information already released prior to the revocation date.
- Unless otherwise specified, this authorization expires **1 year from the date signed**.

**Expiration Date (optional):** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Client Rights:**

- Signing is voluntary — refusal will not affect my coaching services.
- Information disclosed may be re-disclosed by the receiving party and may not remain protected.

**Authorization & Signature:**

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

Coach Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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Sheepdog Leadership Wellness & Coaching, LLC | Lead from the Front. Live with Integrity.