

HeartLight Wellness Coaching

PLEASE ANSWER ALL OF THE FOLLOWING INFORMATION CAREFULLY

Date: _____

Client Information:

Full Name _____ Age _____ Sex: M F DOB _____ SSN _____

Address _____ City _____ State _____ Zip _____

Home Phone(____) _____ Work Phone(____) _____ Cell(____) _____

Email Address _____

Emergency Contact _____ Relationship _____ Phone _____

Who Referred You? _____

Medications/Dosages _____ M.D.Prescribing _____

Payment Information:

Please circle one: Self-Pay Cash Credit Card

Name of Parent or Guardian responsible for bill (if other than client):

Name _____ Address _____

Home Phone _____ WorkPhone _____

I guarantee payment for services rendered to me.

Name

Date

Credit Card Agreement

Personal Balances: Payment is due at time of service. Any balances due past 60 days will be charged to your designated credit card. If an account becomes past due with no valid reason, necessary action will be taken to recover the account balance due.

Missed Sessions/Cancellation: Any missed session or cancellations without a 24 hour notice will be automatically billed to your designated credit card. Please complete and sign below;

Credit Card (Circle): Visa Master Card Discover

Cardholder Name: _____

Credit Card Number: _____

Expiration Date: _____

Security Code: _____

Email my receipt to: _____

*All credit card charges are subject to a 2% processing fee.

I agree to the terms above and authorize you to bill my credit card for unpaid balances due.

Signature

Date

Wellness Coaching Agreement

Client:

1. I am ready and able to invest the time necessary to make improvements to my overall well-being.
2. I acknowledge that I am fully responsible for my own progress through my choices and decisions during this process.
3. I will participate wholeheartedly with my coach and will commit to being on time to our sessions.
4. I agree to openly and honestly share any personal information related to my wellness and progress.
5. I understand that information discussed will be held as confidential unless I state otherwise, in writing, except as required by law.
6. I understand I may have set backs in my behaviors and that these are a normal part of behavior change that may be used positively to establish new behaviors.
7. I understand that I need to ask for the resources, support and feedback I need from my coach.
8. I am aware that I can choose to discontinue coaching at any time during this process if I feel this service is not meeting my needs.
9. I recognize that coaching is not a substitute for counseling.

Coach:

1. I will facilitate an agreement that makes clear the nature of the wellness coaching process.
2. I will support you as you create your own wellness plan and path to change.
3. I will encourage you as you build the ability and confidence to reach your goals and a higher level of well-being.
4. I will listen to you attentively and without judgment or my own agenda.
5. I am committed to being honest and forthright with my feedback.
6. I will promote realistic expectations throughout our discussions and with goal setting.
7. I will ask questions when needed and encourage you to arrive at your own answers.
8. I will assist you in identifying creative solutions as you work through barriers that may arise.
9. I will ask your permission before providing advice or direction.
10. I will make the appropriate referrals for topics that may arise outside of my scope of practice.

Client's Signature: _____ **Date:** _____

Coach's Signature: _____ **Date:** _____

Values Checklist

Personal Values

Rokeach Value Survey



The back of this sheet contains two columns, each with a separate list of values in alphabetical order. Each value is accompanied by a short description and a blank space. Your goal is to rank each value in its order of importance to you for each of the two lists. Study each list and think of how much each value may act as a guiding principle in your life.

Begin with the column on the left side of the page. Select the value that is of most importance to you. Write the number 1 in the blank space next to that value. Next, choose the value that is of second in importance to you and write the number 2 in the blank next to it. Work your way through the list until you have ranked all 18 values on this page.

When you have finished ranking all 18 values, move on to the column on the right side of the page and rank the next 18 values in the same way. **Please complete each list separately.**

When ranking, take your time and think carefully. Feel free to go back and change your order should you have second thoughts about any of your answers. When you have completed the ranking of both sets of values, the result should bring you clarity and awareness of what is important in your life.

After you establish what is really important to you, it is easier to gain focus on the direction you want your life to take. It helps you manage your time by guiding your decisions. It helps you determine what is really worthwhile to focus your time and energy on and what things you can say "no" to. It helps you to prioritize tasks, create to-do lists and organize your time. Let this survey serve as an awareness of how to align your life in accordance with your values.

Intrinsic Values
Core moral beliefs

A Comfortable Life
a prosperous life _____

Equality
brotherhood and equal opportunity for all _____

An Exciting Life
a stimulating, active life _____

Family Security
taking care of loved ones _____

Freedom
independence and free choice _____

Health
physical and mental well-being _____

Inner Harmony
freedom from inner conflict _____

Mature Love
sexual and spiritual intimacy _____

National Security
protection from attack _____

Pleasure
an enjoyable, leisurely life _____

Salvation
saved; eternal life _____

Self-Respect
self-esteem _____

A Sense of Accomplishment
a lasting contribution _____

Social Recognition
respect and admiration _____

True Friendship
close companionship _____

Wisdom
a mature understanding of life _____

A World at Peace
a world free of war and conflict _____

A World of Beauty
beauty of nature and the arts _____

Extrinsic Values
The means of achieving your values

Ambitious
hardworking and aspiring _____

Broad-minded
open-minded _____

Capable
competent; effective _____

Clean
neat and tidy _____

Courageous
standing up for your beliefs _____

Forgiving
willing to pardon others _____

Helpful
working for the welfare of others _____

Honest
sincere and truthful _____

Imaginative
daring and creative _____

Independent
self-reliant; self-sufficient _____

Intellectual
intelligent and reflective _____

Logical
consistent; rational _____

Loving
affectionate and tender _____

Loyal
faithful to friends or the group _____

Obedient
dutiful; respectful _____

Polite
courteous and well-mannered _____

Responsible
dependable and reliable _____

Self-controlled
restrained; self-discipline _____