COACH PRACTICE TOOL

Client Intake Template

Use this form during your first coaching call (or send as a Google Doc for the client to fill out beforehand). The goal is a clear baseline picture in 15 minutes.

Who you are

Full name

Partner / spouse name (if applicable)

Kids — ages

City / state

Best email · best phone

Financial snapshot

Monthly take-home income (you)

Monthly take-home income (partner, if applicable)

Rough monthly expenses (housing + everything else)

Total debt today — and the highest interest rate

Total savings — and the lowest-interest account

Retirement / investments today

Goals

Top three things you want to be different in 12 months

1.

2.

3.

One thing you'd like to be true in five years

Money story

What is the biggest money worry on your mind right now?

What is one money decision you're proud of?

What changes for you if this coaching works?

Logistics

Preferred session cadence (weekly · biweekly · monthly)

Time of day that works best

Anything I should know before we start?