

Given Name		
Prefer to be called		
Street Address		
City, State, Zip		
Email		
BEST phone #		
Date of Birth (mm/dd/yyyy)		
Emergency Contact		
Emer. Cont. Phone #		
Coach Use Only	Learning Type Primary: Secondary:	Tendency Primary: Secondary:

Thank you for entrusting me with this part of your Wellness journey! Here is what we both can expect by contracting with me to be your Health and Wellness Coach. Please read and sign where indicated to show you fully understand this content.

Terms

Session Number Coaching is a process, and depending on what behaviors you want to change, the length of time we spend will vary. Though not binding, it is reasonable to expect to meet for 6-12 sessions, with additional sessions after 12 agreed upon together after this, but **you always decide how long.**

Length of Session Except for the first session (which runs 90 minutes), most sessions are 45-50 minutes in length, and will be scheduled weekly or every two weeks, depending on what behavior change(s) we address. Often, summer and the Christmas Holidays extend the length between sessions, but generally, clients find they are most successful at meeting their self-designed goals when meeting at frequent intervals for the first 6 weeks.

Contact Outside of Sessions I welcome your emails or texts in-between sessions, particularly if you have a question or would like to share your progress. I reserve the right to reply within 24 hours but will often respond sooner. If you contact me on a Saturday, it is possible you will not hear from me until Monday. You may also schedule short calls (10 minutes). There is no charge for these additional contacts, but if contact would become frequent, we would create an additional billing agreement.

Fees Session fees are \$90 for the first session and \$75 for each session thereafter. Payment is due at time of services rendered, and can be made via cash, credit card, or PayPal. Promotional session fees are at the discretion of Propempo Wellness. It is possible your Health Savings Plan or Flex Spending dollars will work if you receive an invoice through me via Square.

How We Meet Since COVID, I have found videoconferencing via my private, professional account on Zoom (you do not pay for this service) or by phone has increased both promptness and attendance to sessions, so this avenue will be used for most appointments, with exceptions made in rare occasions. You are responsible to call at our scheduled time. If you are more than 15 minutes late for your session, I will assume you have cancelled and you will still be responsible for the session fee, waived in the event of emergency.

Rescheduling If rescheduling a session, 24-hours' notice is required, or it is considered a missed session.

Privacy

I will always maintain the utmost confidentiality out of respect to you as a person and to maintain the integrity, effectiveness, and trust of the coaching relationship. Here are the ways I might disclose your information:

- I may disclose your information to other professionals within my business for the purpose of payment or other business operations.
- I may disclose your information to notify or assist in notifying a family member, or another person responsible for your care, in the event of an emergency or of your death.
- As required by law, I may disclose your information to public health authorities for purposes related to preventing or controlling disease, injury, or disability, reporting child abuse or neglect, reporting domestic violence, reporting disease or infection exposure, coroners' or medical examiners' reporting.
- I may disclose your information in the case of any administrative or judicial proceeding.
- I may disclose your information to a law enforcement official for purposes such as identifying or locating a suspect, fugitive, material witness or missing person, complying with a court order or subpoena, and other law enforcement purposes.
- It may be necessary to disclose your information to appropriate persons in order to prevent or lessen a serious and imminent threat to the health or safety of a particular person, or to the general public, or to prevent or lessen harm to yourself. (Initial to left)
- I may disclose your information for military, national security, prisoner, and government benefits purposes.

Initial:

Name:		Date:	
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Coaching Release and Waiver

I, _____ (fill in name) understand and agree with the following statements:

In consideration of my receiving wellness coaching services from a certified wellness coach, I do hereby waive, release, and forever discharge Carolyn Schlicher, Propempo Wellness, and Liquid Body Life Co. and its officer, agents, independent contractors, employees, representatives, executors, and all others from any and all responsibility or liability for injuries or damages resulting from my participation in any activities or my use of fitness equipment arising out of my participation in any activities, onsite or offsite, under such coaching.

I understand Carolyn Schlicher and Propempo Wellness is neither a psychological or medical professional or service. The goal of coaching is to create a supportive alliance in which I can attain my own stated goals and become independent of the coach.

I agree using any or every part of this wellness coaching service is entirely at my own risk. Wellness Coaching services are provided "as is," without warranty of any kind, either express or implied, including without limitation any warranty for information services, uninterrupted access, or product and services provided through the coaching alliance. I understand I may be coached in fitness, nutrition, weight management, stress management, emotional resilience, life visioning, overall preventative health, and health risk management. These services may be requested or rejected at my own free choice. I am free to discontinue coaching at any time, or restart as desired, limited only by schedule availability.

Wellness coaching services are not meant to be a substitute for counseling or treatment for mental health problems. Wellness coaching is an excellent way to gather individualized information by which my own decision can be made. I understand my wellness coach is an independent contractor paid privately.

I do hereby further acknowledge I have either had a physical examination and have been given a physician's permission to participate or I have decided to participate in activity and/or use of equipment and machinery without the approval of my physicians and do hereby assume all responsibility and risks of injury or death from such participation and activities.

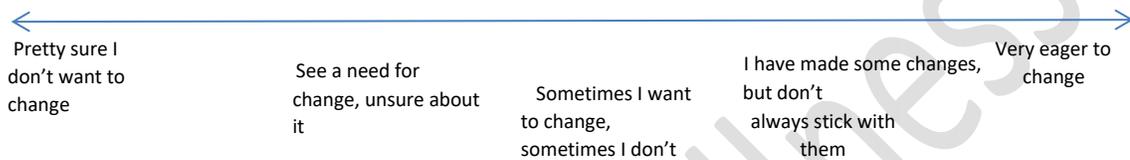
No assumption of responsibility is made, or given, and the party requesting such advice agrees not to hold Carolyn Schlicher, Propempo Wellness, or Liquid Body Life Co. liable in any form or fashion, for such actions taken of their own accord. The method and process by which this advice and direction are given in no way would constitute an agreement or liability on the part of the provider and is acknowledged to be different in many ways than a one-on-one clinical or psychological counseling process.

Name:		Date:	
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A Note from Carolyn

Here are some things I offer as a kindness and clarification as you consider working with me. If you do not feel you can work with me because of any of these statements, have further questions, or need clarification, please contact me before our first session so your time can be spent fully on why you are seeking Wellness coaching.

- Most people who come to me are looking for change, and may feel anywhere along the spectrum of:



A good Wellness Coach understands **the client is the expert on him/herself** and must first get the client accessing what they already know in order to create the motivation necessary to create change. The ability to educate follows behind. My training and certifications provide great resources for education, but this education will happen within the context of you recognizing and developing your motivation and incentives for change and with your permission. This approach is scientifically proven more effective than health programs or disciplines you try to conform to. You are coming to me because you want change, and therefore I want you to have expert ability to achieve and sustain change.

- Coaching is an ongoing professional partnership. It is not therapy or counseling. Sometimes, coaching is done in conjunction with counseling, or issues present themselves in our sessions indicating counseling might also benefit you as you work on your change.
- If you specifically ask me to educate in spiritual matters, I use concepts found in the Christian Bible. I do not require my clients to be Christians, convert to my belief system, or believe in anything I do. Because my faith stance includes a conviction Jesus Christ did not discriminate against people, I work very hard to honor whom I believe He is and how He would treat you: as a person worthy of love and respect because He created you.
- Sometimes, people think a Wellness Coach's role is imparting information you must conform to in order to change. This is actually less beneficial to the client in the long run, because it tends to create increased feelings of guilt or failure if you are unable to do what is being recommended, perpetuating the cycle of why you are in the Wellness situation you are. A Board-certified Wellness Coach has actually taken evidence-based, graduate-level training to understand the psychology of change, and coaches from the framework of you growing in your motivation to change and becoming autonomous with this change, meaning it becomes a permanent part of your lifestyle.

Agreement

Client

1. I am ready and able to invest the time necessary to make improvements to my overall wellbeing.
2. I acknowledge 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 information discussed will be held as confidential unless I state otherwise, in writing, except as required by law (see Privacy section in this packet).
6. I understand I may have **setbacks in my behaviors and these are a normal part of behavior change** which can be used positively to establish new behaviors.
7. I understand I need to ask for the resources, support, and feedback I need from my coach.
8. I am aware I can choose to discontinue coaching at any time during this process if I feel this service is not meeting my needs, and if I do so, I will notify my coach.
9. I recognize coaching is not a substitute for counseling.

Coach

1. I will facilitate an agreement which 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 wellbeing.
4. I will listen to you attentively and without judgement 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.
9. I will ask your permission before providing advice or direction.
10. I will make the appropriate referrals for topics arising outside of my scope of practice.

Client Signature:		Date:	
Coach Signature:		Date:	

Assessments

Because coaching is about you being the expert on yourself, it is good for me to learn more about you so I might speak, meet with, and offer data in a way best suiting your learning style. *There is no one answer better than another, and no, this is not a “trick” or even diagnostic tool.*

Assessment A

Please circle in each row the item which **best and most frequently** describes what happens when you are in the situation being suggested.

1. When I try to concentrate...	I grow distracted by clutter or movement, and I notice things around me other people don't notice.	I get distracted by sounds, and I attempt to control the amount and type of noise around me.	I become distracted by commotion, and I tend to retreat inside myself.
2. When I visualize...	I see vivid, detailed pictures in my thoughts.	I think in voices and sounds.	I see images in my thoughts involving movement.
3. When I talk with others...	I find it difficult to listen for very long.	I enjoy listening, or I get impatient to talk myself.	I gesture and communicate with my hands.
4. When I contact people...	I prefer face-to-face meetings.	I prefer speaking by telephone for serious conversations.	I prefer to interact while walking or participating in some activity.
5. When I see an acquaintance...	I forget names but remember faces, and I tend to replay where we met for the first time.	I know people's names and I can usually quote what we discussed.	I remember what we did together, and I may almost “feel” our time together.
6. When I relax...	I watch TV, see a play, visit an exhibit, or go to a movie.	I listen to the radio, play music, read, or talk with a friend.	I play sports, make crafts, or build something with my hands.

7. When I read...	I like descriptive examples and pause to imagine the scene.	I enjoy the narrative most and I can almost “hear” the characters talk.	I prefer action-oriented stories, but I do not often read for pleasure.
8. When I spell...	I envision the word in my mind or imagine what the word looks like when written.	I sound out the word, sometimes aloud, and tend to recall rules about letter order.	I get a feel for the word by writing it out or pretending to type it.
9. When I do something new...	I seek out demonstrations, pictures, videos or diagrams.	I want verbal and written instructions, and to talk it over with someone else.	I jump right in to try it, keep trying, and try different approaches.
10. When I assemble an object...	I look at the picture first and then, maybe, read the directions.	I read the directions, or I talk aloud as I work.	I usually ignore the directions and figure it out as I go along.
11. When I interpret someone’s mood...	I examine facial expressions.	I rely on listening to tone of voice.	I focus on body language.
12. When I teach other people...	I show them.	I tell them, write it out, or I ask them a series of questions.	I demonstrate how it is done and then ask them to try.
TOTALS		A	T/K

(adapted from *The Wisdom of the Whole*, Linda Bark, 2011)

Assessment B

Please circle in each row the item which *best* describes YOU, based on the prompt. Go with your first reaction. Sometimes, these things will not be true; I totally get it.

<p>1. How do you feel about New Year's Resolutions?</p>	<p>I enjoy them and with also make resolutions at other times.</p>	<p>I will make and keep resolutions, but January 1 is an arbitrary date and it is inefficient to wait to start a New Year's Resolution.</p>	<p>I no longer make New Year's resolutions; I've failed too much I the past.</p>	<p>I will not bind myself to resolutions. But if I do, it's because I wanted to do it, enjoyed it and liked the challenge.</p>
<p>2. If there is a sign on a wall stating, "No Cell Phones" and someone pulls out their phone and starts using it...</p>	<p>I feel discomfort, and I may or may not look around to see if someone is going to do something about it, or I might do something myself.</p>	<p>I will try to figure out the possible reasons the person is using their cell phone and decide if it is warranted.</p>	<p>I'd feel uncomfortable, because this might inconvenience or annoy others, and/or the person might get reprimanded.</p>	<p>I don't care. In fact, I might get a kick out of the fact they are using it.</p>
<p>3. You've signed up for a free course for fun, and someone close to you mentions they will be minorly inconvenienced if you take the class. You...</p>	<p>Decide to go. You signed up for it, you are sorry someone else is slightly inconvenienced, but they'll live. You're going to stick with the plan and follow through.</p>	<p>Decide to go. You signed up for it, you are sorry someone else is slightly inconvenienced, but they'll live. Your reasons and justifications leading you to sign up for the class still hold.</p>	<p>Aren't sure what you will do. Being in this situation causes you discomfort, and you are most concerned with the relationship of the person who will be inconvenienced.</p>	<p>Are not sure you would sign up for a course in the first place, because how can you know what you'll feel like doing that day? But if you did sign up, you may or may not go when it's time, depending on how you feel.</p>
<p>4. In the past, when you have positively changed a health habit, you...</p>	<p>Saw what you needed to do and did it until it was done.</p>	<p>Researched what I was supposed to do, and then did it and I still do it.</p>	<p>Succeeded best when I had someone to work on it with (trainer, partner, friend, etc.)</p>	<p>Did it when you felt like it.</p>

5. You have 2 To-Do lists: one you created to get done, and one created by another person for you to get done. You...	Complete your own To Do list as easily as the one the other person gave you.	Complete more easily your own To Do list, but it is harder to get done the one given to you by another person.	Find it harder to complete your own To Do list, but it is easier to get done the one created by the other person.	Keep your own running To Do list, and when you feel like tackling some chore, you'll do it, but only when you are in the mood.
6. Do people ever call you rigid?	Yes	If not, move to the next question.		
7. Has anyone ever said you ask too many questions?	If not, move to the next question.	Yes		
8. Do you agree: "Promises made to others shouldn't be broken, but promises made to myself can be?"	If not, move to the next question.		Yes	
9. Do you think something is more fun if it is against the rules?	If not, move to the next question.			Yes
10. This best describes what I ask when presented with a choice:	Should I do this?	Does this make sense?	Does this matter to anyone else?	Is this the person I want to be?
TOTALS	U	Q	O	R

(Adapted from Gretchen Rubin's *The Four Tendencies*, 2017)