



New Client Welcome Packet

Please complete the following forms and return by email or snail mail. Be sure to sign and date them before you send them in. All forms and payment for sessions or session packages must be received prior to the first scheduled coaching session.

- New Coaching Client Welcome and Agreement
- Client Intake
- Statement of Intent
- Release of Relevant Treatment Information
- Confidentiality Agreement
- Readiness Survey

“True art awakens the extraordinary ovation.”—Hafiz





Welcome to Ovation Coaching.

We've had a successful introductory call or in-person meeting, and have determined that we are optimistic and enthusiastic about working together to accomplish your goals in an atmosphere of receptivity, open communication, creativity and compassion. To bring our "best selves" to the coaching relationship, it is important that we share the same understanding about how we will work together.

Basic Shared Agreements:

- I recommend a minimum 3-month commitment to bi-weekly sessions (total of 8 sessions). A 3-month commitment ensures that you understand it takes work to change habits of thinking and behaving, that you are determined to make a concentrated effort, and that you know it takes time to achieve satisfying results.
- Each session is 1 hour long and takes place by phone, unless otherwise agreed.
- Coaching Packages or Individual Sessions can be paid by check or will be billed prior to the first session via Paypal. Payment must be received in order to begin our coaching relationship.
- I will be fully present at all coaching sessions, free from distractions, and respectfully request that you do the same. A coaching session in a public venue with loud background noise is not efficient. Cell phones tend to present connection problems and/or safety issues, so I encourage you to be on a land line in a quiet space whenever possible.
- We agree to show up at the mutually scheduled time for our coaching session. If you have to reschedule you agree to do so with a minimum of 48 hours notice. I understand that emergencies arise and will do my best to accommodate those on a case-by-case basis. In-person office meeting cancellations with less than 24 hours notice will be charged a \$35 fee.
- More than one missed coaching appointments during our coaching relationship (a "no-show," without notification or rescheduling) will be a signal for us to re-evaluate the coaching relationship. Prepaid "package" sessions for any "no-shows" will be forfeited. Individual missed appointments will be invoiced at the regular hourly rate.
- If you've purchased a package and find yourself unable to use your sessions, you may put the remaining sessions on a 3-month hold before they expire. Coaching fees are nonrefundable should you decide to "quit" the process, as our complimentary session is designed to remove the possibility that we would not be a good fit for each other.
- I welcome communication between coaching calls via email (amy@ovation.coach) or phone (410.268-1240). It is my expectation that you will reach out if you hit a "sticky" spot that you would like some perspective on, and that you will share the successes that you have on the way to creating a life that's true to your essential self. If you need an "emergency call" I can usually accommodate you within the week. I do not bill for calls that are 10 minutes or less.
- I welcome your input and questions along the way. Our relationship is a collaborative one, and the more you put into it the more you will get out of it. Ask questions, challenge my point of view, bring resources to the table that you've found, tell me where I'm wrong, and share with me your insights along the way. You are your own best expert, and you will come to trust yourself more fully throughout this process.

I will call my coach at the scheduled time (410.268.1240). I understand that I am responsible for any cell or landline charges. I have read and agree to the working agreements above, and will honor them during our coaching relationship.

Client Signature

Print Name

Date



Ovation Coaching Client Intake Form

I am honored to be embarking on this journey with you, and look forward to getting to know you better over the coming months. To expedite my understanding of the basics about you, please complete the following information and snail mail or email it back to me before our first session.

Name:

Street Address:

City/State/Zip:

Preferred Email:

Phone:

Text (if different):

Name of Employer and Position, if applicable:

Name of Spouse/Significant Other, if applicable:

Names and Ages of Children, if applicable:

What's the most important thing I should know about you right now?

Which area(s) of your life are the least satisfying to you right now? How long have you felt this way?

What deep longing brings you here? How long have you known this longing?

If someone were to give you the best gift you could imagine receiving today, what would it be?



Statement of Intent

Coaching services delivered by Amy Steindler, MBI Certified Life Coach, primarily utilize principles, methods and tools of the Martha Beck Coaching System, and are subject to the ethical standards of the International Coach Federation (ICF). Coaching is meant to challenge, uplift, and support you psychologically, however, coaching is not psychotherapy. If you feel psychologically stressed to the point that it is interfering with your ability to function, please seek the help you need in the form of a licensed therapist. Life coaching may augment your therapy, but the work of coaching is meant to be done when major emotional and psychological wounds are already healing or healed. In that spirit, please read the following and sign below should you agree to each statement and wish to proceed:

- I understand that the coaching services I will be receiving from Amy Steindler are not offered as a substitute for mental health care. I also understand that my coach, Amy Steindler, is not acting as a psychotherapist, and does not purport to offer mental health care.
- I understand that my coach will maintain the confidentiality of our communications only to the extent defined by the laws of the states in which each of us resides.
- I understand and agree that I am fully responsible for my well-being during my coaching calls, and subsequently, including my choices and decisions. In that way, I am responsible for my own results.
- I understand that all comments and ideas offered by my coach are solely for the purpose of aiding me in achieving my defined goals. I have the ability to give my informed consent, and hereby give such consent to my coach to assist me in achieving such goals.
- I hereby release, waive, acquit and forever discharge Amy Steindler and their agents, successors, assigns, personal representatives, executors, heirs and employees from every claim, suit action, demand or right to compensation for damages I may claim to have or that I may have arising out of actions, omissions, or commissions taken by myself or by Amy Steindler as a result of the advice given by Amy Steindler or otherwise resulting from the coaching relationship contemplated hereunder. I further declare and represent that no promise, inducement or agreement not herein expressed has been made to me to enter into this release. The release made pursuant to this paragraph shall bind my heirs, executors, personal representatives, successors, assigns, and agents.

I have read the statements above and I understand and agree with the points contained therein:

Client Signature and Date



Informed Consent and Release of Relevant Information

I am currently in treatment/consulting with the following provider types (e.g., psychotherapist, nutritionist, homeopathic practitioner, psycho-pharmacologist, or any other relevant medical professional):

Type of provider(s):

Working with since:

If I am working with a psychotherapist or psychologist, my practitioner knows that I am working with Amy Steindler and that our work is not therapeutically based. I understand, and agree, that Amy Steindler does not represent herself as anything other than a certified professional coach.

Agree: _____ (please initial)

Not Applicable _____ (please initial)

I understand that Amy Steindler will be keeping a confidential record of my name, phone number and email address during and after the coaching relationship. This information will be used exclusively for the purposes of coaching me.

I understand, that in keeping with the requirements of coach credentialing by the International Coach Federation (www.coachfederation.org) Ovation Coaching LLC will be keeping a confidential record of my name, phone number and email address. This information will be used exclusively for the purposes of meeting those requirements.

I, _____, am fully disclosing this information and am not withholding pertinent information.

Signature _____ Date _____



CONFIDENTIALITY AGREEMENT

The conversations that we have within our coaching sessions are confidential and will be protected as such. Information will be shared outside of our sessions only with your written consent or in the event that a Court Order demands it, however, the following are instances where I would be obligated by law to break our confidentiality agreement without your permission:

- If it is assessed during your participation in coaching sessions that abuse or neglect of children or elders is occurring.
- If in my presence you threaten to harm another individual, and I am convinced that you will act on this threat, or that you may lose control of your actions.
- If at any time during the course of our sessions, I determine that you are a danger to yourself, I will inform you of that opinion and make every effort to keep you from endangering your life. In some cases this may include notifying the police or family members.

Amy Steindler
Ovation Coaching, LLC



Intentions Assessment

Timing, they say, is everything. Let's talk about what makes this the right time for you to work with me. Your candid (and confidential!) answers to the following questions will help us both recognize what's behind your desire to change and your willingness to work through whatever discomfort the changes require of you.

1. I am willing to trust the process, and my coach, to support the changes I want to make.

Yes No Not Sure
2. I am confident that by engaging in this process, I will reach my desired goals.

Yes No Not Sure
3. I will speak openly and honestly to my coach, even when it makes me uncomfortable.

Yes No Not Sure
4. If at any time I feel I'm not getting what I need or expect from my coach I will share it as soon as I sense it, and do my best to articulate what I do need or expect.

Yes No Not Sure
5. I am willing to be honest about my own behaviors and to "own" the self-defeating behaviors that cause me to stand in my own way.

Yes No Not Sure
6. I am willing to consider my thoughts and actions without judging myself harshly for having them.

Yes No Not Sure
7. I think of coaching as a journey and a process that will be sometimes challenging, sometimes emotionally triggering, and sometimes great fun.

Yes No Not Sure
8. I think of coaching as the best path to living a fulfilling life.

Yes No Not Sure
9. I think of coaching as an indispensable investment in myself, my potential, and my overall well-being.

Yes No Not Sure
10. I am willing to become more and more curious about the way I am in the world, the way I relate to myself and to others, and the ways in which my thoughts and beliefs and statements represent my values.

Yes No Not Sure



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11. I am willing to try new things and to actively incorporate the coaching tools I've learned into my life.

Yes No Not Sure

12. I am willing to face the tough issues I've avoided until now, so I can break through the barriers that have held me back.

Yes No Not Sure

13. I am willing to take full responsibility for the circumstances of my life, including the consequences of my actions and words.

Yes No Not Sure

14. I've answered the questions above truthfully and to the best of my ability.

Yes No Not Sure