

CARRIE GRAVES
Psychospiritual Life Coaching

CLIENT WELCOME PACKET

Welcome to Carrie Graves Psychospiritual Life Coaching. The following information allows me to get to know you better and enables me to coach you more effectively. Please complete this information and return before your first coaching call.

I. PERSONAL DATA

- *Date:*
- *Name:*
- *Address:*
- *City/State:*
- *Zip Code:*
- *Date of Birth:*
- *I heard about coaching from or was referred by:*

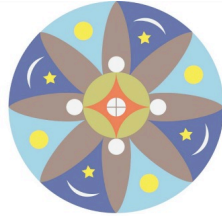
II. COMMUNICATION DATA

- *Day Phone:*
- *Evening Phone:*
- *Cell Phone:*
- *E-mail:*
- *Web site:*
- *The best time to reach me is:*
- *The best way to reach me is:*

III. CAREER

- *Current Occupation or Profession:*
- *Company/Business:*
- *Position/ Title:*
- *Responsibilities in current position:*
- *Length of time in current position:*
- *Business Address:*
- *City:* *State:* *Zip:* *Phone:*
- *Previous Occupations or Professions:*

1703 Richland Street / Columbia, SC / 29201
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IV. EDUCATION

- *Highest Level Completed:*
- *Major Fields:*
- *Minor Fields:*
- *Other Areas of Study in Which You Are Interested:*

- *Professional Certifications:*

V. FAMILY

- *Single: Married: Life-Partner: Divorced: Widowed:*
Dating:
- *Anniversary: Times Married:*
- *Name of Spouse/Significant Other: Age:*
- *Spouse's/ Significant Other's Occupation:*
- *Names and Ages of Children:*
 - *Name Age*
 - 1.
 - 2.
 - 3.

VI. FAMILY OF ORIGIN

- *Name of Father: Age: Living: Deceased:*
- *Name of Mother: Age: Living: Deceased:*
- *Parents live on their own: Live with you:*
Live with a sibling: Live in a retirement village/home:
Live in an assisted living facility:

- *The religious/spiritual background to which I was born was:*
Methodist Church
- *The religious/spiritual tradition that I now follow or ascribe to is:*

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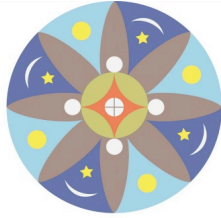
- *What I want to accomplish through the coaching process:*
 - 1.
 - 2.
 - 3.

- *I have the following questions:*
 - 1.
 - 2.
 - 3.

- *Other things I'd like you to know about me:*
 - 1.
 - 2.
 - 3.

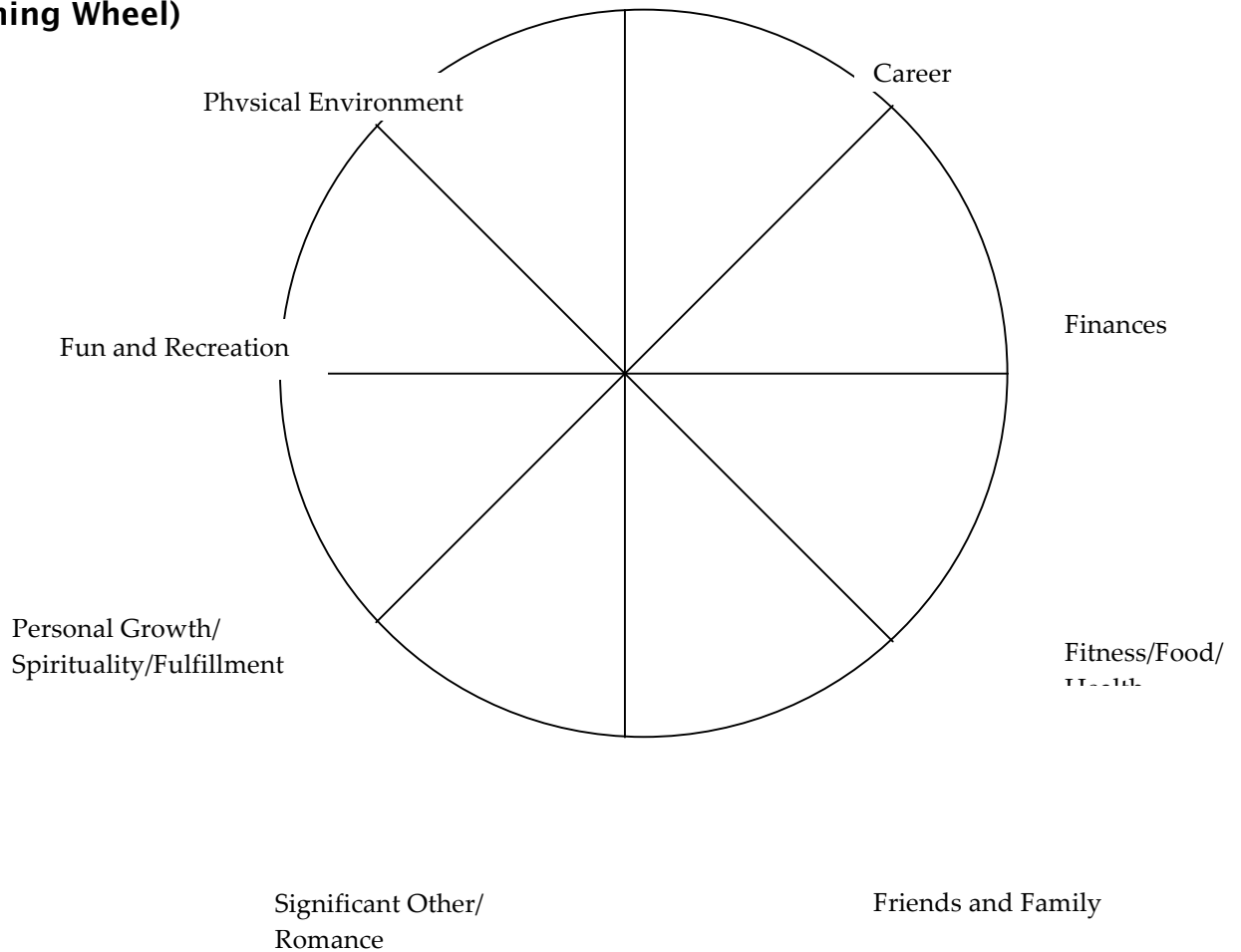
- *What I need most from my coaches:*
 - 1.
 - 2.
 - 3.

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**FUNDAMENTALS OF LIFE
(Coaching Wheel)**

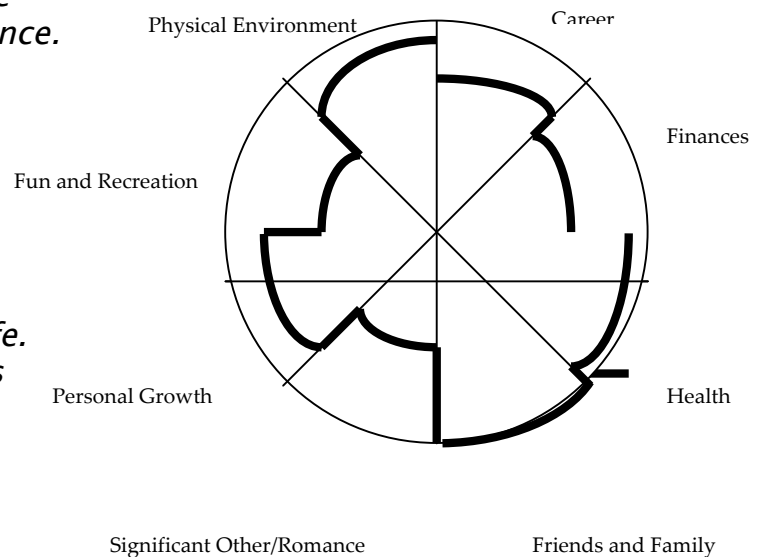


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Example

Directions: The eight sections in the Fundamentals of Life represent balance. Regarding the center of the wheel as 0 and the outer edge as 10, rank your level of satisfaction with each life area by drawing a straight or curved line to create a new outer edge (see example). The new perimeter of the circle represents your Fundamentals of Life. How bumpy would the ride be if this were a real wheel?



*Used by permission. Adapted from *Co-Active Coaching* by Laura Whitworth, Henry Kimsey-House, and Phil Sandahl, Davies-Black Publishing, 1998

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