



Client Intake Form

BitterSweet Coaching

Life Strategy | Financial Wellness | Personal Growth

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Welcome to BitterSweet Coaching. This form helps us understand your goals so your coaching experience can be focused, practical, and personalized.

CONTACT INFORMATION

Full Name

Phone

Email

Preferred Contact Method

☐

Email

☐

Phone

☐

Text

WHAT WOULD YOU LIKE SUPPORT WITH?

☐

Life Strategy & Mindset Coaching

☐

Financial Wellness Coaching

☐

30-Day Money Reset Support

☐

Chronic Illness Coaching

☐

Teen & Young Adult Coaching

☐

Group Coaching / Workshop

Other / Not Sure Yet

YOUR GOALS

What brings you to coaching right now?

What are the top 3 goals you would like to work toward?

What feels like the biggest obstacle or challenge right now?

What would make coaching feel successful for you?



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Goals | Readiness | Scheduling | Agreement

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AREAS OF FOCUS

- | | | |
|---|---|---|
| ☐ Mindset | ☐ Goals & Accountability | ☐ Money / Financial Wellness |
| ☐ Career / Education | ☐ Life Transition | ☐ Health-Related Challenges |
| ☐ Confidence / Self-Advocacy | ☐ Habits & Routines | ☐ Other |

How ready are you to make changes right now?

1 = just exploring 10 = ready to take action

- ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

SCHEDULING & PREFERENCES

Preferred meeting format

- ☐ Zoom ☐ In person ☐ Not sure

Preferred days / times

Is there anything else you would like Dr. Garcia to know before your first session?

COACHING AGREEMENT

I understand that BitterSweet Coaching provides coaching, education, support, and accountability designed to help clients clarify goals, develop strategies, and take meaningful action. Coaching is not therapy, medical treatment, legal advice, tax advice, or individualized financial or investment advice. I understand that I remain responsible for my own decisions, actions, and results, and that outcomes are not guaranteed.

- ☐ I have read and understand the coaching agreement above.

Client Signature

Date

Thank you for choosing BitterSweet Coaching.

Your next chapter does not require a perfect plan - just a place to start.

BitterSweetCoaching.com