New Client Checklist

For Client ________________________________ Date ______________

Session Discussed	Topic Discussed w/Client
	Policies & Procedures:
	Number of Sessions per Month
	Length of Sessions
	Monthly Rate
	Payment Procedure
	Late Payment
	Call Arrangements
	Call Policies
	Extra Time/Email
	Problems
	Confidentiality
	How to Terminate
	Impact Statement/Referrals
	Forms
	How Coaching Works:
	Structure of Calls
	Agenda/Recap Forms
	Initial Goals
	Focusing Our Work Together
	Periodic Reviews
	Miscellaneous:
	If ADD:
	Challenges Inventory
	Systems Approach

Wind Beneath Your Wings

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