

Client Intake Worksheet

“Meet Yourself Where You Are”

Your Name:

Date:

SECTION 1: CURRENT SEASON

- Healing
- Rebuilding
- Expanding
- Resting
- Transitioning

What does this season require from you? What would you be willing to do to achieve it?

SECTION 2: ENERGY & CAPACITY

On most days, my energy feels like:

- Low
- Medium
- High

What drains you most right now?

What gives you energy?

SECTION 3: GOALS THAT MATTER

List up to 3 aligned goals (no timelines yet):

- 1.
- 2.
- 3.

Why these goals matter to YOU:

SECTION 4: MINDSET CHECK

A belief that's holding me back:

A belief I want to strengthen:

SECTION 5: SUPPORT & STRUCTURE

What kind of support do you need right now?

- Accountability
- Clarity
- Permission to slow down
- Confidence
- Structure

What other things not mentioned above would you like to share with me that you think it could help us achieve your goals?

Weekly Planner (try it for one week and lets discuss results)

(Sneakers & Stilettos™ Edition)

WEEK OF: _____

TOP 3 PRIORITIES (ONLY 3)

- 1.
- 2.
- 3.

DAILY FLOW (Flexible)

- One meaningful task
- One restorative habit
- One moment of presence

NON-NEGOTIABLE SELF-CARE

- Rest
- Movement
- Nourishment
- Boundaries
- Silence / Reflection

END-OF-WEEK REFLECTION

What worked?

What needs adjusting (not quitting)?

One win I'm celebrating: