

# 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: