



Meridian Physiotherapy, LLC

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Welcome Packet

This Welcome Packet will serve a few main purposes: to gather some basic information and to begin the process of self-reflection so critical to wellness coaching. It will also allow me to know more about your core values.

Please complete the client information section below and the subsequent questions. These questions will require some personal reflection and processing. Please email the completed form back to your coach one week prior to the session.

Client information

Note: Some information (e.g., work phone) is collected for emergency purposes only.

- **Today's date:**
- **Name:**
- **Address:**
- **Phone:**
 - **Cell:**
 - **Home:**
 - **Work:**
- **Email address:**
- **Preferred method of contact (cell phone and/or email):**
- **Do you grant permission for me to contact you at the email address listed?**
- **Do you grant permission for me to leave text and voice messages on your cell phone?**

- **Emergency contact:**
 - **Name:**
 - **Relationship:**
 - **Phone:**

Client's Name (please print)

Client's Signature

Date

1. Prior coaching experience: Please describe any prior coaching or counseling you received, including things you liked and/or did not like about the experience:

2. Please describe your main reason(s) for seeking coaching right now.

3. Discuss life areas with which you are satisfied. What is going well?

4. While we will set goals together during our sessions, what is your sense of the change(s) you'd like to see happen in your life?

5. What is your sense of the strengths you would like to maintain and/or enhance in your life?

The questions on the next page ask you about your values in life. There are several values assessments which inquire about values in a more formalized manner, e.g., The Valued Living Questionnaire (Wilson & Groom, 2002) and the Valued Directions Worksheet (Forsyth & Eifert, 2007). The questions below draw from the underlying philosophy of these surveys but take a more open-ended approach to allow for reflection on specific values on your choosing.

6. Values Reflection

- *Please take a few moments and reflect on your key values in life (e.g., work/career, family, education, friendship, leisure time, physical fitness/health, faith/spirituality/religion). Which areas of life are most important to you? What gives you meaning?*
- *After this period of reflection, identify your 5 most important values in the table below, commenting on why these values are important to you (you can, of course, choose values not listed as examples above).*

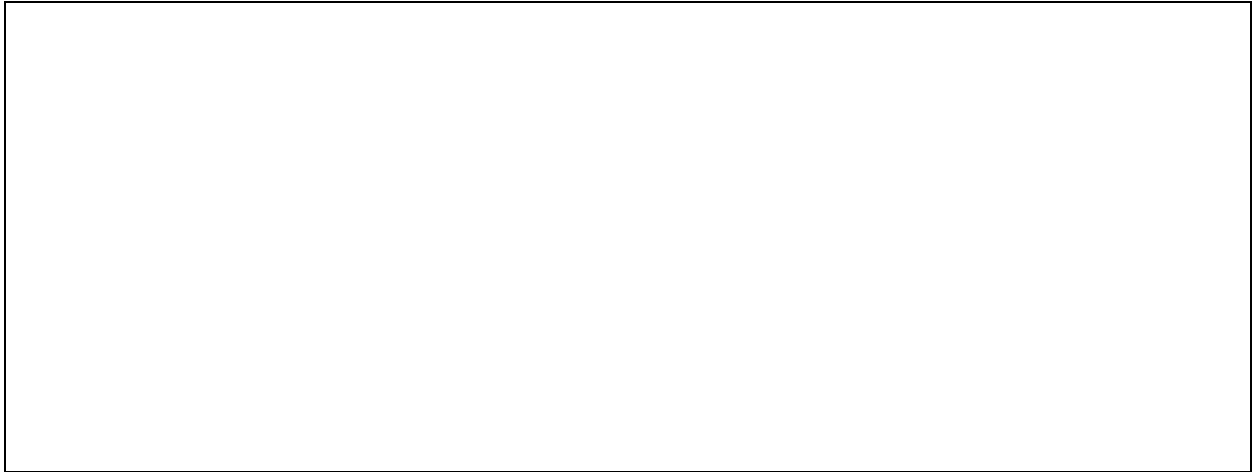
Value	Why value is important to you

7. Values Congruence:

- *Please take a few moments and reflect on the 5 key values you listed above. Think about how your current life aligns or does not align with those values.*

Value	Current life alignment with value

8. Please tell me about your current meditation practice and any exposure to mindfulness or related practices, such as yoga.

A large, empty rectangular box with a thin black border, intended for the user to provide their response to the question above. The box is currently blank.