Logo

Description automatically generated

**Intake Form**

1)  Name:

2)  Occupation:

3)  Marital Status:

4)  Birthdate:

5)  Things you would like to work on for your career in the next 6 months i.e. learn new skills, increase revenue, etc

6)  Pick your top three in order of importance.

1.

2.

3.

7)  Any issues that have been active over the past 6 – 12 months?

8)  Your office: (please supply a detailed drawing of your office and furniture)

* 1. How long have you had this office?
  2. What is your favorite thing about your office?
  3. What is your least favorite thing about your office?

9)  Please provide any relevant info about the home and or property’s history below (i.e. issues with prior owners)

10)  How would you describe yourself if you had to use only three adjectives? (for example: Nervous, fun-loving, shy...)

11)  Strongest personal trait. (sometimes this can be your most dominant trait):

12)  Weakest personal trait. (don’t think negatively, think of it as the one you most want to enhance):

13)  If you could live anywhere, where would it be (for example on the water, on a beach, in a big city, in the mountains...)?

14)  Describe your perfect work day...

*The information above will remain confidential and will not be shared with anyone*