

THREE TREASURES LIFE COACHING

Client Alignment & Readiness Intake Form

Three Treasures Life Coaching is a reflective, depth-oriented experience designed for women ready to make intentional changes in how they live, lead, and care for themselves.

This form helps us determine whether this coaching relationship is the right fit for you at this stage of your life.

SECTION 1: FOUNDATIONAL QUALIFIERS

(Keep this short and dignified)

1. Age Range
2. 45–54
3. 55–64
4. 65+
5. Highest Level of Education Completed
6. Bachelor’s Degree
7. Master’s Degree
8. Doctorate / Professional Degree
9. Current Professional Status
10. Executive / Leadership Role
11. Business Owner / Entrepreneur
12. Senior Professional
13. Transitioning / Redefining Career
14. Semi-Retired / Retired
15. Household Income Range (optional but useful)
16. \$100,000–\$150,000
17. \$150,000–\$250,000
18. \$250,000+

“These questions help ensure we honor your time and offer an experience aligned with your life stage.”

SECTION 2: WHY NOW? (Motivation & Readiness)

What prompted you to seek coaching at this point in your life?

Example prompt:

“What feels unresolved, incomplete, or ready for change?”

Which areas of your life feel most out of alignment right now?

- Energy / Vitality
- Emotional Well-Being
- Purpose or Direction
- Relationships
- Health or Stress
- Identity After Midlife Changes
- Work-Life Integration
- Other: _____

How long have you felt this way?

- Less than 6 months
- 6–12 months
- 1–3 years
- Longer than 3 years

SECTION 3: THE THREE TREASURES SELF-ASSESSMENT

(This is where your model shines)

Shen – Mind & Inner Narrative

Which statement feels closest to your current experience?

- My mind feels clear and focused most days
- I function well, but feel mentally fatigued
- I often feel scattered, overwhelmed, or overthinking
- I sense a disconnect between who I am and how I live

Qi – Energy & Emotional Flow

How would you describe your daily energy?

- Steady and resilient
- Inconsistent but manageable
- Frequently depleted
- Productive on the outside, exhausted on the inside

Jing – Essence, Purpose & Longevity

When you think about the next 10–20 years, which resonates most?

- I feel grounded and confident in the direction I'm going
- I'm successful but unsure what comes next
- I want this next chapter to feel meaningful—not just busy
- I know something needs to change, but I don't want to rush it

SECTION 4: COACHING FIT & EXPECTATIONS

What are you hoping coaching will help you shift or clarify?

Which best describes your approach to personal growth?

- I value reflection and depth over quick fixes
- I've done inner work before and want to go further
- I'm new to this but open and curious
- I want practical guidance grounded in wisdom and experience

Have you worked with a coach, therapist, or mentor before?

- Yes (briefly describe what worked or didn't)
- No

SECTION 5: COMMITMENT & INVESTMENT READINESS

Three Treasures Life Coaching is a premium, time-intensive experience. Which statement best reflects you?

- I am ready to invest time, energy, and resources in myself
- I am exploring options and want to understand the commitment
- I am not ready for a long-term investment at this time

What level of commitment feels realistic for you right now?

- Monthly sessions with reflection work between sessions
- A structured multi-month coaching journey
- Unsure—open to recommendation

SECTION 6: FINAL ALIGNMENT QUESTIONS

What does “taking care of yourself” truly mean to you now—at this stage of life?

If nothing changed over the next year, what would concern you most?

Is there anything else you feel is important for us to know about you before considering this coaching relationship?

Thank you for your thoughtful responses.
If Three Treasures Life Coaching feels aligned, you may be invited to a private consultation to explore next steps together.