



CLIENT WELCOME PACKET

Welcome to Growthstead

Your guide to getting started, plus the short forms we'll use
to prepare for our first session together.

Glad you're here.

Hello, and welcome.

Starting something new takes some courage, especially if you've started and stopped before. This packet is your map for the first few weeks: what to expect from me, what I'll ask of you, and a handful of short forms that help me show up prepared for our first session.

Here's what I believe. Lasting health is built at a pace you can actually keep. You're the expert on your own life. My job is to listen well, ask good questions, share what's worked for others, and keep us moving one honest step at a time.

There are no right answers on any of these forms. Share what feels useful and skip what doesn't. I keep what you share confidential, with the limited exceptions described in the coaching agreement.

Take your time with the forms, and send them back before we meet. The next page shows you how.

I'm looking forward to getting started.

Matthew Downs

Growthstead Health & Wellness Coaching

A quick note: health coaching supports your habits, goals, and well-being. It isn't medical care or therapy, and it doesn't replace advice from your doctor or other providers. You'll find more on this in the next section.

How we'll work together

Three ideas shape every session. The details change from client to client, but these stay the same.

Pace over pressure

Change that lasts is change your life can hold. We set a pace you can keep, not one that only looks good on paper.

You set the goal

You know your body and your life better than any program does. I listen first, then guide.

Grounded in what works

No trends, no guesswork. Plans draw on proven principles of nutrition and behavior change.

What a session looks like

- 1 Check in.** We start with how you're doing and what's happened since we last talked.
- 2 Choose today's focus.** You decide what matters most right now, and we shape the time around it.
- 3 Explore.** We look at what's working, what's in the way, and what you want more of.
- 4 Plan one next step.** Something small and specific that fits your week, chosen by you.
- 5 Wrap up.** We recap, and you tell me what you're taking away. Ongoing clients can also message me between sessions.

What coaching is, and what it isn't

Coaching is

- A partnership where you lead and I guide
- A place to get clear on goals and habits
- Steady accountability and encouragement
- Practical tools and ideas to try, with your permission

Coaching is not

- Medical care, diagnosis, or treatment
- Therapy or mental health care
- A replacement for your doctor's advice
- A guarantee of any specific result

Need urgent help? In an emergency, call 911. If you're in emotional crisis in the U.S., you can call or text 988 at any time. Please check with your doctor before making significant changes to how you eat or exercise.

Your first steps

Everything below is in this packet. Tick each one off as you go.

WHAT	WHEN
☐ 1 Coaching Agreement Read it through and sign. Questions are welcome.	Before session 1
☐ 2 Client Intake & Health History The basics about you, your goals, and your health.	Before session 1
☐ 3 Getting to Know You A few open questions. Short answers are fine.	Before session 1
☐ 4 Wheel of Life A ten-minute snapshot of how life feels right now.	Before session 1
☐ 5 Values Survey Circle what matters most to you.	Before session 1
☐ 6 Goal & Progress Tracker Fill in as we go. Bring it to each session.	Ongoing

How to send things back

Online

Use the form links in your welcome email. Each one takes a few minutes, and your answers come straight to me.

On paper

Print these pages, fill them in, then scan or photograph them and email them to Mattd@growthsteadhealth.com.

Not sure about a question? Skip it, or tell me what's unclear. We can always talk it through in our first session.

Questions about any of this? Email Mattd@growthsteadhealth.com and I'll get back to you.

Client intake & health history

Please complete this before our first session. What you share is held in confidence and used only to prepare for our work together.

About you

Full name / nickname

Pronouns (optional)

Date of birth

Best way to reach you

Email

Mobile phone

Emergency contact name

Emergency contact phone

Your goals

What brings you to coaching right now?

How would you like your habits or your health to be different?

Health & well-being

Share as much or as little as you're comfortable with.

Health conditions or diagnoses you know about

Medications you take (prescription and over-the-counter)

Supplements you take

Stress level (circle one)

calm (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) very high

Energy level (circle one)

drained (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) energized

How do you usually handle stress?

How would you describe your movement and physical activity?

How would you describe how you eat, and your relationship with food?

Foods you avoid (preference, allergy, or intolerance)

Do you often experience any of these?

☐ Gas ☐ Bloating ☐ Constipation ☐ Diarrhea ☐ Nausea ☐ Heartburn ☐ None of these

Typical hours of sleep

How rested do you usually feel?

Care & support

Are you under the care of a doctor or mental health provider? If so, tell me a little about it.

Is anything weighing on you where you'd like resources or a confidential referral?

Is there anything that would make our sessions easier or more comfortable for you? (accessibility, communication, scheduling, anything else)

Anything else about your health history I should know?

Thank you for taking the time. I look forward to working with you.

Getting to know you

Answer as fully or as briefly as you like. There are no wrong answers, and your responses shape our first conversation.

Three things you'd like me to know about you

What helps you do your best when someone is coaching or supporting you?

Any worries or assumptions about coaching?

What does being healthy and well mean to you? Tell me about a time you felt your best.

What do you already do to take care of yourself?

Where are things going well, and where would you like more?

If things went the way you hoped, what would life look like six months from now?

Who supports you, and what do they give you?

What brings you joy, and how often do you make room for it?

What usually gets in the way?

Have you worked with a coach or similar support before? What helped, and what didn't?

How ready do you feel to get started? (circle one)

not yet ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ready now

Anything else you'd like to add?

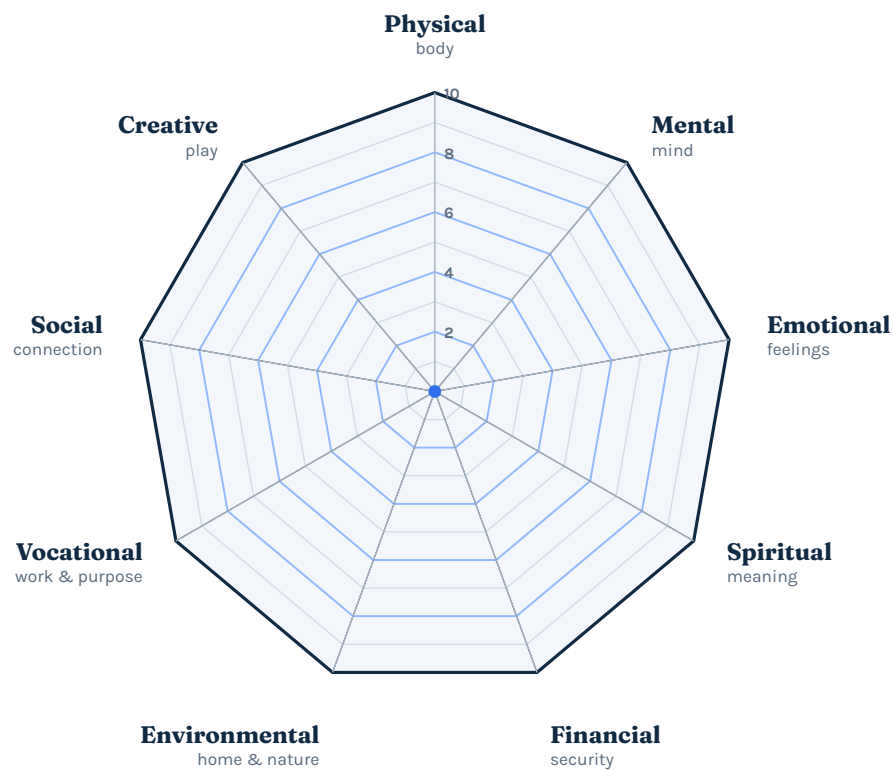
Wheel of life

Nine areas of well-being, all connected. This is a snapshot of how satisfied you feel in each one today.

Name _____

Date _____

How to use it: the center is 1 and the outer edge is 10. Mark your satisfaction level on each spoke, then connect your marks to draw your own wheel.



How smooth or bumpy is your wheel? Which areas are asking for attention?

Which areas are you ready to work on now, soon, or later?

Values survey

Your values are what matter most to you. When our habits line up with them, change feels meaningful instead of forced.

Check every word that speaks to you. This list is only a starting point, so add your own at the bottom. Your values can shift over time, and they can look different at work and at home.

- | | | | |
|---|--------------------------------------|---------------------------------------|---------------------------------------|
| ☐ Accomplishment | ☐ Discovery | ☐ Humor | ☐ Presence |
| ☐ Adventure | ☐ Ease | ☐ Independence | ☐ Privacy |
| ☐ Authenticity | ☐ Empathy | ☐ Integrity | ☐ Purpose |
| ☐ Balance | ☐ Energy | ☐ Joy | ☐ Resilience |
| ☐ Beauty | ☐ Excellence | ☐ Kindness | ☐ Respect |
| ☐ Boldness | ☐ Fairness | ☐ Knowledge | ☐ Rest |
| ☐ Calm | ☐ Faith | ☐ Leadership | ☐ Security |
| ☐ Challenge | ☐ Family | ☐ Learning | ☐ Self-care |
| ☐ Community | ☐ Flexibility | ☐ Love | ☐ Service |
| ☐ Compassion | ☐ Focus | ☐ Loyalty | ☐ Simplicity |
| ☐ Confidence | ☐ Freedom | ☐ Mastery | ☐ Spirituality |
| ☐ Connection | ☐ Friendship | ☐ Mindfulness | ☐ Spontaneity |
| ☐ Contribution | ☐ Fun | ☐ Nature | ☐ Stability |
| ☐ Courage | ☐ Generosity | ☐ Openness | ☐ Strength |
| ☐ Creativity | ☐ Gratitude | ☐ Optimism | ☐ Teamwork |
| ☐ Curiosity | ☐ Growth | ☐ Order | ☐ Tradition |
| ☐ Dependability | ☐ Harmony | ☐ Patience | ☐ Trust |
| ☐ Determination | ☐ Health | ☐ Peace | ☐ Wisdom |
| ☐ Discipline | ☐ Honesty | ☐ Playfulness | |

Add your own

My top five values right now

- 1

- 2

- 3

- 4

- 5

What do these values tell me about what I want more of?

Health coaching agreement

Please read this carefully. If anything is unclear, ask me before you sign.

This agreement is between **Matthew Downs**, Growthstead Health & Wellness Coaching ("Coach"), and _____ ("Client"). It begins on ____/____/____ and covers the coaching services described below.

1. What coaching is

Coaching is a partnership. The Client sets the goals and makes the decisions, and the Coach supports with questions, ideas, structure, and accountability around health and well-being habits.

2. What coaching is not

Coaching is not medical care, diagnosis, treatment, therapy, or mental health care, and it does not replace advice from the Client's doctor or other providers. The Coach does not prescribe, or advise changes to, medications. The Client agrees to check with a healthcare provider before making significant changes to diet or exercise, and to tell the Coach if their care changes.

3. Client responsibilities

The Client agrees to take part honestly, take ownership of their choices and actions, and set aside the time and energy that coaching requires. The Client understands that results depend on their own effort and that no outcome is guaranteed.

4. Coach responsibilities

The Coach agrees to be prepared and present, to listen without judgment, to protect the Client's privacy, to ask for feedback along the way, and to refer the Client to other professionals when that would serve them better.

5. Sessions and communication

The program runs for _____ months and includes _____ sessions of _____ minutes each, held by video, phone, or in person as agreed. Between sessions, the Client may reach the Coach by email, and the Coach will reply within _____ business days.

6. Fees and payment

The fee is \$_____ in total, or \$_____ per month. Payment is due _____ and is made by _____.

7. Scheduling and cancellation

Please give at least 24 hours' notice to reschedule or cancel. A session missed or cancelled without that notice may be counted as used. The Coach will make a good-faith effort to reschedule.

8. Refunds

A refund requested in writing before the first session will be given in full, less a \$_____ administrative fee. Once the program has begun, unused sessions are not refunded but may be rescheduled for up to _____ months after the first payment.

9. Confidentiality

What the Client shares stays private. The Coach will not share it, or use the Client's name as a reference, without the Client's written consent. The exceptions are when disclosure is required by law, or when the Coach reasonably believes there is a serious risk of harm to the Client or others. Coaching is not a legally privileged relationship in the way medical or legal relationships can be.

10. Ending the agreement

Either person may end this agreement at any time with written notice. The Client remains responsible for sessions delivered through the end date.

11. Entire agreement

This document is the full agreement between the Coach and the Client. Any change must be in writing and signed by both.

CLIENT

Printed name

Signature

Date

COACH

Printed name

Matthew Downs

Signature

Date

Goal & progress tracker

Come back to this often. It helps us notice what's working, what's in the way, and where to go next.

Name

Date

Goal 1

Target date: ____ / ____ / ____

What I want to achieve

Action steps

Status ☐ Not started ☐ On track ☐ Behind ☐ Completed

Progress, wins, and challenges

Goal 2

Target date: ____ / ____ / ____

What I want to achieve

Action steps

Status ☐ Not started ☐ On track ☐ Behind ☐ Completed

Progress, wins, and challenges

Goal 3

Target date: ____ / ____ / _____

What I want to achieve

Action steps

Status ☐ Not started ☐ On track ☐ Behind ☐ Completed

Progress, wins, and challenges

Reflecting on my overall progress

What's been working well for me?

What barriers have come up, and how might I handle them?

What support or adjustments would help me stay on track?

My next steps
