

SMR Consulting and Coaching

Terms Of Service

SMR Consulting and Coaching is a provider of complimentary care, life and marriage coaching and personal development.

While Dr. Corey Allan is a licensed professional (LMFT within the state of Texas), when working with him outside of the state of Texas, he does not engage in patient diagnosis, counseling services, or the practice of medicine except where appropriately authorized to do so by a professional referral.

At this time, services are not covered by any medical insurance.

All advice is given in good faith and without prejudice and must be deemed appropriate by the client. If any doubt exists please ask for clarification.

If you are under the care of a doctor, counselor or mental health practitioner you **must** advise that you are seeking life coaching and also be aware we may not be able to work on that issue directly.

Unless otherwise agreed in writing, payment is due in full for sessions booked, 48 hours prior to commencement of sessions.

PayPal is the preferred method of payment but there is also a payment button on Simple Marriage that will allow the use of credit cards.

Cancellations within 24 hours or 'no-shows' are subject to full payment.

If you do need to cancel an appointment, please do so via telephone/text or e-mail.

If you are late for an appointment please understand that as a courtesy to other clients, we may still need to finish at the agreed time.

Important: Coaching or consulting cannot commence until this form is signed either electronically or by hand and e-mailed to corey@smrnation.com

If you are in any doubt about anything on this form please phone for clarification BEFORE signing.

I acknowledge that I have read and agree to the terms of service.

Sign _____ Date _____

Print Name _____

Client Details

All Information Is Strictly Confidential.

Please answer all the following questions.

Name:

Full Mailing Address, including Zip Code:

Date Of Birth:

Anniversary Date (if married):

Preferred Phone Number:

E-Mail Address:

Can this e-mail address be used for all correspondence?

Do you have a partner/spouse, if so what is their name?

Do you have children, if so what are their names and ages?

Are you currently under the care of a medical doctor or mental health practitioner for specific non-routine issues? If yes, please give more details.

Are you taking any prescribed medication and if so, please list and explain what condition they have been prescribed for?

Do you smoke? If so, how many per day approximately?

Do you drink, if so how many drinks per day approximately?

Have you read *Naked Marriage*?

Listened to *Sexy Marriage Radio*?

Is there any other information that you think I should be made aware of?

Client Intake Chart

On a scale of 1 to 10 (1 being as bad as it could be and 10 being fully achieved/happy) grade each of the categories below as they are for you now - i.e. if you are fully satisfied with the amount of time, energy, attention you are paying towards your savings put a 10 in the box next to savings.

If there is a category that is not applicable still try and score against it i.e. you may have no children but be delighted you have no children in which case score 10. Or you may really want children in which case mark it accordingly. Similarly, you may have no desire to meditation in which case score it a 10 or you may work for yourself in which case promotion is irrelevant, in which case score 10.

Remember, this is to measure how you are NOW and there are no right or wrong answers.

Health		Diet		Fitness		Fun/Social	
Wealth/Savings		Salary		Career/Job		Friends	
Colleagues		Significant Other		Family		Focus	
Relaxation		Meditation		Peacefulness		Spirituality	

What is your minimum requirement from coaching/consulting that will make you think it was a worthwhile investment of time and money?

What is your dream outcome. What is the thing or things that if you achieved would have you thinking working with Dr. Allan was one of the best decisions you ever made?

Please tell me things you think are likely to motivate and/or de-motivate you. Also, if there is any more background information that you think may be helpful please feel free to continue on another sheet of paper.