

New Client Form

Name _____

Personal Data

Address: _____

City, State, Zip: _____

Professional Data

Company Name: _____

Title: _____

Address: _____

City, State, Zip: _____

Contact Information

Home Telephone: _____ Mobile Telephone: _____

Office Telephone: _____ Email Address: _____

Referred By: _____

Emory Alumni Data

Class Year/School: _____

Major/Area of Study: _____

Credit Card Information (American Express, VISA, MasterCard). All clients must have credit card information on file to hold appointment times for coaching sessions and telephone consultations. Payment is due in full at time of service by check or credit card for in-person sessions. Fees for tele-sessions and coach on call services will automatically be charged to the account noted on this form. Scheduled appointments must be canceled at least 24 hours in advance or you will be charged in full for the scheduled session. Monday appointments must be cancelled no later than 5:00 pm on Friday.

- I understand that appointments not cancelled within 24 hours as stated above will be charged in full to my credit card and that NO REFUNDS will be issued. I also understand that any payment, whether credit card or check, is subject to a non-refundable \$50.00 handling fee if the card is declined or a check is returned. Credit card disputes must be handled directly with coach for appropriate refund or adjustment to be made by coach/company and all chargebacks are subject to a non-refundable fee of \$50.00 per transaction.

Credit Card: American Express Visa MasterCard

Card Number: _____ Expiration Date: _____ / _____

Signature: _____

Billing address: _____

Please provide billing address If different from home address

Disclosure and confidentiality: Information shared by the client during the coaching sessions will remain confidential to the extent provided by law; however, please know there is no confidentiality privilege recognized by any court between a career coach and client. Information provided to Potential Matters is not protected by statutory privilege. Confidentiality exception for Emory Alumni: Information shared during session is confidential, however, contact information and number of sessions is provided to the Association of Emory Alumni (AEA). If you do not want contact information shared, clients may opt for private coaching status, however, private coaching would not be subject to the special rate provided via the AEA partnership. To opt for private client status, please email emory@potentialmatters.com.