



# **ADAPTIVE Coaching**

## Intake Form & Consulting Agreement

Prepared for: \_\_\_\_\_

Created by: **AQ Adaptive Intelligence**

# ADAPTIVE Health and Wealth : Coaching Client Intake Form

Please complete this form **before** our first coaching session.

This information will help us both have a clearer understanding of your current health and financial situation; including your goals to better guide our ADAPTIVE Coaching sessions together.

## Personal Information

- Name: \_\_\_\_\_
- Age: \_\_\_\_\_
- Occupation: \_\_\_\_\_
- Address: \_\_\_\_\_
- Email: \_\_\_\_\_
- Phone: \_\_\_\_\_

## Health History

- Describe your current physical health (including any chronic conditions or illnesses):  
\_\_\_\_\_
- What are your current health goals?  
\_\_\_\_\_
- How do you currently prioritize your health? ( ie: medications, diet, exercise, sleep, stress management, herbs, vitamins, supplements, lifestyle, etc.)  
\_\_\_\_\_
- What treatments & procedures have you tried so far and what practitioners have you seen?  
\_\_\_\_\_
- Do you have any specific concerns or challenges related to your health?  
\_\_\_\_\_

## Financial Situation

- Describe your current financial situation (including any debts or investments):  
\_\_\_\_\_
- What are your current financial goals?  
\_\_\_\_\_
- How do you currently prioritize your financial well-being? ( ie: budgeting, saving, investing, privacy, etc.)  
\_\_\_\_\_
- Do you have any specific concerns or challenges related to your financial situation?  
\_\_\_\_\_

## Coaching Goals

- What do you hope to achieve through our ADAPTIVE coaching sessions together?  
\_\_\_\_\_
- What specific areas of your health and wealth do you want to focus on?  
\_\_\_\_\_
- How committed are you to making changes and achieving your goals?  
\_\_\_\_\_

## Availability

- What days (including weekends) and times are you available for coaching sessions?  
\_\_\_\_\_
- Do you prefer in-person, phone, or video sessions?  
\_\_\_\_\_

## Confidentiality

- Anything discussed in our coaching sessions will be kept confidential. Is there anything you are hesitant to share with me?  
\_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# AQ Adaptive Intelligence :

## Consulting Agreement

This Consulting Agreement (the “Agreement” or “Consulting Agreement”) states the terms and conditions that govern the contractual agreement between AQ Adaptive Intelligence having its principal place of business at in no centralized location nor jurisdiction AQ Adaptive Intelligence (the “Consultant”), and [Client Name: \_\_\_\_\_] (the “Client”) who agrees to be bound by this Agreement.

WHEREAS, the Consultant offers consulting services in the field of Health & Wealth; and

WHEREAS, the Client desires to retain the services of the Consultant to render consulting services with regard to Health & Wealth consulting services according to the terms and conditions herein.

NOW, THEREFORE, In consideration of the mutual covenants and promises made by the parties hereto, the Consultant and the Client (individually, each a “Party” and collectively, the “Parties”) covenant and agree as follows:

### 1. Term

This Agreement shall begin on [Today’s Date: \_\_\_\_\_ ]

and continue for [Time/# of sessions: \_\_\_\_\_ ]. Either Party may terminate this Agreement for any reason with 2 Weeks written notice, or 14 day written notice to the other Party.

### 2. Consulting Services

The Consultant agrees that it shall provide its expertise to the Client for all things pertaining to Health & Wealth (the Consulting Services).

### 3. Compensation

In consideration for the Consulting Services, the Client shall pay the Consultant at the rate determined prior to beginning sessions. The Consultant shall invoice the Client once per bundle package time period, and such invoices shall be due and payable before the Client’s receipt of the invoice.

## **4. Intellectual Property Rights in Work Product**

The Parties acknowledge and agree that the Client will hold all intellectual property rights in any work product resulting from the Consulting Services including, but not limited to, copyright and trademark rights. The Consultant agrees not to claim any such ownership in such work products intellectual property at any time prior to or after the completion and delivery of such work documentation or products/services to the Client.

## **5. Confidentiality**

The Consultant shall not disclose to any third party any details regarding the Client's business, including, without limitation any information regarding any of the Client's customer information, business plans, or price points (the Confidential Information), (ii) make copies of any Confidential Information or any content based on the concepts contained within the Confidential Information for personal use or for distribution unless requested to do so by the Client, or (iii) use Confidential Information other than solely for the benefit of the Client.

## **6. Non-Competition**

During the term of this Agreement and for 24 months thereafter, the Consultant shall not engage, directly or indirectly, as an employee, officer, manager, partner, manager, consultant, agent, owner or in any other capacity, in any competition with the Client or any of its subsidiaries, including any company engaged in Health & Wealth services.

## **7. Non-Solicitation of Customers**

During the term of this Agreement and for 24 months thereafter, the Consultant will not, directly or indirectly, solicit or attempt to solicit any business from any of the Company's clients, prospects, employees or contractors unless expressly written in an addendum to this clause.

## **8. Non-Solicitation of Employees**

During the term of this Agreement and for 24 months thereafter, the Consultant will not, directly or indirectly, recruit, solicit, or induce, or attempt to recruit, solicit, or induce, any of the Company's employees, or contractors for work at another company.

## 9. Indemnification

The Client agrees to indemnify, defend, and protect the Consultant from and against all lawsuits and costs of every kind pertaining to the Client's business including reasonable legal fees due to any act or failure to act by the Client based upon the Consulting Services.

## 10. No Modification Unless in Writing

No modification of this Agreement shall be valid unless in writing and agreed upon by both Parties.

## 11. Applicable Law

This Consulting Agreement and the interpretation of its terms shall be governed by and construed in accordance with the laws of the State of South Carolina and subject to the exclusive jurisdiction of the federal and state courts located in The United States, South Carolina.

IN WITNESS WHEREOF, each of the Parties has executed this Consulting Agreement, both Parties by its duly authorized officer, as of the day and year set forth below.

### AQ Adaptive Intelligence Staff

\_\_\_\_\_  
[First name]                      [Last name]                      [Date]

### Client Name

\_\_\_\_\_  
[First name]                      [Last name]                      [Title]

### Client Signature

\_\_\_\_\_  
[First name]                      [Last name]                      [Date]