Hi **(client name),**

It was really good to talk with you today at our Discovery Session. Welcome officially as a client. 😊

I'm looking forward to being part of this exciting journey with you as we gain clarity and direction about the matters we discussed so you can have the life you want.  
**(You could mention a specific goal or outcome that was discussed)**

As I mentioned in our conversation, there are a few things I need from you before the first session on (date and time).  
**(If the new client is in a different time zone to you, quote the session in their time.)**

I have attached for your information/action:

**1. Coaching Agreement;**

The purpose of the agreement is to ensure we are on the same page as to how we will work together. Please read this through. If you are happy with the terms, either sign and return it or email me that you agree with how we will be working together.

If you have any considerations or questions do let me know.

**2. Client Profile;**

So I have your best contact details and a little more information about you, please fill in the attached form and return it. I realize I have some of the information already but it is useful to have it in one place.  
**(This can include address and contact details, marital status, nationality, children - anything you feel comfortable asking for).**

**3. Important questions to get your coaching off to a flying start.**

This is in a document that can be edited so you can save it, fill in the answers and email back to me as an attachment.

We will discuss your answers at our first session.  
**(You can see and download these questions on my related page of** [**Life Coaching Intake Questions.**](https://www.lifecoachingprofessionally.com/life-coaching-questions.html)**)**

**4. My Invoice;**

This is payable before our first session unless otherwise agreed. Payment options are included.

By the way, our sessions are most likely tax deductible for you as consulting or training.

In our first session (where I allow a little extra time if needed), we will begin by going over the above as necessary. Then, we will focus on getting clear on the goals for your coaching series and establish how we can plan and get into action to achieve them.

And of course **(name),** if you have any questions, please email or give me a call.

Warm regards|  
  
**(Your name and business name)**