

DRAGONFLY MOMENTS & TRANSITIONS

COACHING SERVICES - NEW CLIENT PACKET

CLARITY | PURPOSE | TRANSITION | FORWARD MOVEMENT

Your next chapter does not need to begin with all the answers. It can begin with one conversation.

Dr. Susan LaSala-Wood

Ordained Minister | Certified Master Life Coach | Certified Spiritual Life Coach | Certified Grief Coach
(480) 737-2313 | Dragonflymomentsandtransitions@gmail.com
www.Dragonflymomentsandtransitions.com

WELCOME

This packet helps me understand what is bringing you to coaching and what kind of support may fit. If we decide to work together, you will receive the complete coaching agreement, confidentiality information, policies, and financial terms before coaching begins.

1. WHAT BRINGS YOU TO COACHING?

- | | |
|---|--|
| ☐ Grief & Life Transition | ☐ Spiritual Guidance & Soul Alignment |
| ☐ Life Purpose & Direction | ☐ Empowerment & Confidence Building |
| ☐ Relationship / role transition | ☐ Boundaries / confidence / personal growth |
| ☐ Not sure yet - help me identify where to begin | ☐ Other |

What is happening in your life right now that led you to reach out?

What would you most like to understand, change, strengthen, or move toward?

2. YOUR CONTACT INFORMATION

Name	
Phone	
Email	
Preferred contact	
Best time to reach you	

3. SESSION OPTIONS

- ☐ 15-minute Focus Session
- ☐ 30-minute Guided Session
- ☐ 45-minute Alignment Session
- ☐ 60-minute Empowerment Session
- ☐ 90-minute Intensive Clarity Session
- ☐ 4-Week Package - four 60-minute sessions
- ☐ 8-Week Package - eight 60-minute sessions
- ☐ Not sure - please recommend a starting option

The 15-minute Focus Session is best suited to brief check-ins for established clients. Longer sessions allow greater time for exploration, reflection, planning, and deeper coaching work. Session and package pricing will be discussed prior to scheduling so you can select the option that best fits your goals and needs.

4. HOW WOULD YOU LIKE TO MEET?

- | | |
|--|--|
| ☐ In person, when available | ☐ Phone |
| ☐ Virtual / video | ☐ No preference |

Preferred days

Preferred times

5. WHAT YOU CAN EXPECT

Compassionate, individualized conversation. Coaching is client-directed and forward-focused.

Reflection with purpose. Sessions may include questions, values exploration, goal development, accountability, spiritual reflection when desired, and practical exercises.

Your beliefs and boundaries are respected. Faith-based discussion is available when it fits your preferences; it is not required.

You remain the decision-maker. Coaching provides perspective, structure, encouragement, and accountability. You remain responsible for your choices and actions.

6. PAYMENT & SCHEDULING

DMT is private pay and does not bill health insurance. Payment options may include Zelle, Venmo, and eligible cards processed securely through Square. A minimum of 24 hours' notice is required for cancellation or rescheduling. Complete financial terms are provided before coaching begins.

- | | |
|---|---|
| ☐ I prefer Zelle | ☐ I prefer Venmo |
| ☐ I prefer a secure Square card-payment link | ☐ Please discuss payment options with me |

7. IMPORTANT COACHING SCOPE

DMT coaching is a collaborative, non-medical service supporting reflection, clarity, goals, life transitions, grief-related adjustment, spiritual exploration, confidence, and purposeful action. It is not medical care, nursing care, psychotherapy, psychiatric treatment, diagnosis, substance-use treatment, legal advice, financial advice, or crisis intervention.

No healthcare, nurse practitioner-patient, psychotherapy, or other clinical treatment relationship is created through DMT coaching. Coaching does not replace evaluation or treatment by an appropriately licensed professional. No particular outcome is guaranteed.

DMT is not an emergency or crisis-response service. Immediate medical, psychiatric, or safety emergencies require appropriate emergency services or prompt in-person professional care.

ACKNOWLEDGMENT & RETURN

I understand that this is a prospective-client inquiry packet. If coaching is appropriate and we choose to work together, I will receive and complete the applicable coaching agreements and policies before services begin.

Name	_____
Signature	_____
Date	_____

Return this packet: Print and complete it, then scan or photograph the completed pages clearly and email them to dragonflymomentsandtransitions@gmail.com. Questions may be directed to (480) 737-2313.

Privacy note: Do not email credit-card numbers, CVV/security codes, detailed medical records, Social Security numbers, or other highly sensitive information. Secure payment instructions are provided after services are confirmed.