

FORM 06: Basic Client Intake Questionnaire

From Riz & Oriah:

You only get one first impression with a new client. This form helps you set the tone: grounded, clear, and sacred. You're not just collecting information—you're initiating trust.

Use this intake form before private sessions, mentorships, or even group programs. It ensures your container is rooted in integrity, discernment, and deep presence.

CLIENT INTAKE FORM

All information is confidential and used solely to support your experience.

BASIC INFO

Full Name: _____

Email: _____

Phone (optional): _____

Location / Time Zone: _____

PRACTICE ALIGNMENT

What inspired you to book this session or join this program?

Have you worked with a spiritual mentor, coach, or energy worker before?

☐ Yes ☐ No

If yes, please share what resonated or didn't:

What are you currently navigating? (emotionally, spiritually, or energetically)

What are 1–2 outcomes or breakthroughs you hope to receive from our work together?

PRACTICAL PREFERENCES

Preferred name or pronouns (if any): _____

Are you open to intuitive or psychic insights during the session?

☐ Yes ☐ No ☐ I'm not sure

Would you like the session to be recorded (if available)?

☐ Yes ☐ No

DISCLAIMER & CONSENT

By submitting this form, I acknowledge that this session is spiritual and intuitive in nature. I understand it is not a substitute for medical, legal, or psychological advice, and I take full responsibility for my experience.

Signature: _____

Date: _____

INSTRUCTOR NOTE TO STUDENTS:

You can turn this into a digital form using Google Forms, JotForm, Wix, or your website. Keep it simple—but let it reflect your voice and style.

It's not about paperwork—it's about presence. You're showing your client you care about their inner world before you ever begin. Customize as needed, you can add all the forms into one form. You can also make it more concise.