

FORM 17: Ongoing Client Notes Log

From Riz & Oriah:

Your clients are not case studies—they're souls in motion.

As a spiritual guide, coach, or intuitive, one of the most powerful things you can do is *witness* someone's evolution with consistency. Keeping clear, ethical notes allows you to track their transformation without judgment—and reflect their progress back to them with clarity.

This log isn't about documenting problems. It's about capturing momentum.

Use it for private sessions, group programs, or long-term mentorships. We would rather give you extra forms to sift through and choose which one is a fit.

◆ ONGOING CLIENT NOTES TEMPLATE ◆

Client Name: _____

Date of Session: _____

Session Number: _____

Session Length: _____ (min)

1. INTENTION / THEME OF SESSION:

What was the main focus they brought forward today?

2. INSIGHTS & CHanneled Messages (if any):

What came through that felt divinely guided or pivotal?

3. CLIENT BREAKTHROUGHS / SHIFTS:

Any mindset, emotional, or energy shifts observed?

4. TOOLS / HOMEWORK GIVEN:

What practices, journaling, or action steps were assigned?

5. ENERGY CHECK-IN / CHAKRA OR AURA INSIGHTS (optional):

6. NEXT SESSION PLAN / THEMES TO REVISIT:

What's evolving? What needs to be tracked next time?

Practitioner Initials: _____

Date Completed: _____

INSTRUCTOR NOTE TO STUDENTS:

Keep this log private and secure. Do not share client notes with others unless under professional supervision or written consent. This is part of spiritual ethics and trust.

You are not here to “fix” your clients. You are here to mirror their power back to them.