

Client: \_\_\_\_\_ Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Who do you serve?

Describe your Favorite Client: \_\_\_\_\_

Tech Perspective:  Ok  Moderate  \_\_\_\_\_

Faith: \_\_\_\_\_

Political Views: \_\_\_\_\_

Family Values: \_\_\_\_\_

Where do they Stop?: \_\_\_\_\_

Movie Buff  No  Yes

Athlete  No  Yes

### Challenges

What Might they be Recovering from:

- Addiction  Alcoholism  Shopaholic  Grief  Perfectionism
- Gambling  Sugar  Diagnosis  Divorce  COVID  Fear of Sales
- Fear of Public Speaking  Violence  Legal Abuse  Financial Abuse
- Institutional Abuse

### Community Connections

Service Clubs: \_\_\_\_\_

Faith Communities: \_\_\_\_\_

Business Chambers: \_\_\_\_\_

Networking Groups: \_\_\_\_\_

Fitness Clubs: \_\_\_\_\_

Other: \_\_\_\_\_

### Additional Notes

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