

Where your healing begins and your hope is restored.



Certified Grief & Life Coaching with Felicia Shephard

WELCOME LETTER, CLIENT ONBOARDING, & AGREEMENT PACKET

Welcome Letter

Dear Client,

Welcome to *From Grief to Grace LLC*, a grief and life coaching service. My name is Coach Felicia, and I am excited to be a part of your journey from grief to grace.

I want to first acknowledge the courage it takes to seek support during a time of sorrow and sadness. Grief is unpredictable and sometimes unexpected, but you have taken the first step in your healing. Give yourself credit because this is a huge accomplishment. This space has been intentionally designed to be one of encouragement, compassion, honesty, emotional safety, and accountability. This is a safe space where you are free to process your experiences without judgment, without pressure, without fear.

As your Grief & Life Coach, I am here to walk alongside you, guided by Christ's love and wisdom. For example, some clients find it helpful to explore their feelings through reflective journaling or prayer, and I will support you in discovering what tools resonate most with you. Together, we will create a plan, build your self-awareness, and develop emotional tools that encourage you to navigate your grief with love and grace. This process aims to help you rediscover your sense of identity and hope.

Grief cannot be simply fixed, rushed, or resolved on a timeline. It is not wrong for you to feel hurt or unsure which way to turn. Grief is something to honor, explore, and gently process, moment by moment.

I am grateful that you have chosen me to support you in this process. Remember, you are already on your way toward healing, toward better.

Abundant blessings,
Felicia Shephard

FNS

Certified Grief & Life Coach
From Grief to Grace Coaching, LLC.

“Where your healing begins and your hope is restored.”



Date: _____ / _____ / _____

From Grief to Grace LLC

INTAKE FORM

To help me serve you better, please take a few moments to provide the following information as completely as possible. All information is subject to the rules of confidentiality. Please place 'n/a' for any question that may 'not apply'.

Name: _____ DOB: _____ / _____ / _____ F _____ M _____

Address: _____

City _____ State _____ Zip Code _____

Phone: (_____) _____ E-mail: _____

Race: _____ Highest Education: _____

Occupation: _____ Emergency Contact Person: _____

Name	Relationship	Phone Number
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MARITAL STATUS AND CHILDREN

CURRENT MARITAL STATUS:

- Married
 Never Married
 Widowed
 Divorced
 Separated

Name of current spouse (if applicable): _____

Anniversary date: _____ How many times have you been married? _____

I. Are you currently in a relationship, but not married? Y _____ N _____
 II. Do you consider your partner your common law spouse? Y _____ N _____

CHILDREN:

Name:	Gender:	Age:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Coaching Goals & Objectives

WHAT AREAS OF YOUR LIFE WOULD YOU LIKE TO FOCUS ON?

- Personal Growth
 Relationships
 Financial Goals
 Career/Business
 Health & Wellness
 Other: _____

What major losses or traumas have you experienced?

List up to 3 things that you find overly challenging, you are grieving from, or you may be personally tolerating and putting up with in your life at present.

1.

2.

3.

How do you like to be supported when facing obstacles in your personal growth or thought process (*examples: have a good listener, strategize with someone, work with a solution with an advocate, journal, self-reflection and accountability, etc.*)?

Who will be supporting you through this process?

List up to 3 things you expect to accomplish by hiring me as your Life and/or Grief Coach?

1.

2.

3.

What do you hope to achieve through the coaching process? In other words, what are your goals?

PERSONAL BACKGROUND

Briefly describe your current life situation (family, work, support system):

In a typical week, what do you spend a great amount of time doing? _____

On a scale of 1 to 10, 10 high, rate the amount of stress in your life right now. _____

STRESS *(Please select any of the following that apply to you):*

_____ Physical Symptoms of Stress _____ Inability to Adapt _____ Fatigue _____ Anxiety

_____ Sleeping Problems _____ Helplessness _____ Stomach Problems

_____ Difficulty Making Decisions _____ Loss of Faith _____ Hopelessness _____ Burnout

_____ Irritability _____ Exhausted, having nothing left to give anything/anyone

Others: _____

FEARS *(Please select any of the following that apply to you):*

_____ Disorganized Thoughts _____ Worrying _____ Avoiding People

Please give examples of how each of the above fear/stress symptoms that you checked impair your ability to succeed (i.e., socially, emotionally, occupationally, physically, etc.)

What are your primary stressors? (What stresses you out?) _____

List your hobbies below: _____

What do you spend most of your free time doing? _____

MENTAL HEALTH, AND SUPPORT SYSTEM

*(The information provided in this section is for informational use **only**. As a Life and Grief Coach, I do not diagnose or treat mental health conditions. If you have concerns about your mental health, I encourage you to seek support from a licensed mental health professional.):*

Have you received any mental health support or therapy in the past? If yes, please specify

Are you currently taking any medications or receiving medical treatment?

Are you currently receiving support from a mental health professional (therapist, counselor, psychiatrist, etc.)? Yes _____ No _____ Please explain why: _____

If yes, please provide the name of your provider and their contact information:

Name: _____ Phone Number: _____

Address: _____

Do you give permission for me to discuss your coaching progress with your mental health provider to ensure coordinated support? Yes _____ No _____

Are you experiencing any thoughts of harming yourself or others? Yes _____ No _____

Do you feel safe? Yes _____ No _____

FAITH-BASED COACHING APPROACH

From *Grief to Grace Coaching* is a Christ-centered coaching service. As a Minister and Grief & Life Coach, my approach to coaching is rooted in biblical principles, spiritual guidance, and the Word of God. While my faith informs how I support and guide clients, I honor and respect each individual's personal beliefs and background. My intention is not to impose, but to offer a foundation of truth, hope, and healing through a believer in Christ's perspective.

Please indicate your comfort level below:

Do you identify as a believer in Jesus Christ?

- Yes
- No
- Prefer not to say

What is your denominational structure? _____

- Prefer not to say

Are you open to coaching that may include biblical principles, faith-based encouragement, or spiritual perspective?

- Yes, I am comfortable with this
- I am open, but prefer minimal incorporation
- No, I would prefer a non-faith-based approach

CONSENT, DISCLOSURES, AND ACKNOWLEDGEMENTS

1. Nature of Coaching Services

In coaching, a coach provides compassionate guidance, practical tools, and personalized strategies to help clients understand their feelings, develop healthy coping mechanisms, and create new pathways for living meaningfully. As both a grief and life coach, I support you in honoring your grief while also focusing on rebuilding your life with love, grace, and renewed purpose. This process empowers you to move forward with hope and resilience.

Important: Coaching is not therapy, counseling, psychiatric care, legal advice, or medical treatment. Grief coaching is a specialized, forward-focused support that helps individuals navigate the complex emotions and life changes that come with loss. Unlike therapy, which often emphasizes processing past experiences, grief coaching encourages growth, healing, and hope in the present and future.

2. Professional Status and Scope

Felicia Shephard serves as a Certified Grief & Life Coach and is also a Licensed Minister in the State of Alabama. Coaching services provided are not intended to diagnose, treat, or cure any mental health disorder or medical condition. The coaching relationship does not include mental health diagnosis, psychotherapy, counseling, crisis intervention, medication management, or any other services that require licensure in medicine, psychology, counseling, or social work.

If concerns arise that fall outside the scope of coaching, the client may be advised to seek support from a licensed mental health professional, medical doctor, psychiatrist, or other qualified healthcare provider. In case of emergency, the client is encouraged to contact emergency services immediately.

3. Client Responsibility

The client understands that coaching is a collaborative process focused on personal growth, goal setting, and self-awareness. The client remains solely responsible for all decisions, actions, and outcomes related to their life, health, relationships, and well-being before, during, and after coaching sessions. The client agrees to actively participate and take responsibility for implementing strategies discussed during coaching.

Disclaimer: The client acknowledges that coaching is not a substitute for medical, psychological, legal, or other professional advice or treatment. No guarantees or promises are made regarding specific results, improvements, or outcomes. The coaching relationship does not establish a therapeutic or diagnostic relationship. The client understands that it is their responsibility to seek appropriate professional services when needed.

Client Initials: _____

4. Emotional Risk Acknowledgment

The client understands that grief and life coaching may involve discussions of painful losses, unresolved emotions, family conflicts, relationship challenges, trauma-adjacent experiences, identity disruptions, anger, guilt, sadness, and other emotionally activating material. Participation in coaching may lead to temporary distress, fatigue, or emotional discomfort.

The client recognizes the potential for emotional triggers to arise during coaching sessions. If at any point the client feels overwhelmed, anxious, depressed, or experiences thoughts of harming themselves or others, they agree to seek immediate support from a licensed mental health professional or emergency services. Coaching is not a substitute for professional mental health treatment, and the client bears responsibility for seeking appropriate care if needed.

5. Mental Health and Medical Disclaimer

Felicia Shephard provides coaching services that are supportive and forward-focused, designed to promote personal growth, awareness, and goal achievement. These services do not diagnose, treat, or cure any mental health, medical, or psychological conditions. Coaching is not a substitute for professional healthcare, and it is the client's responsibility to seek appropriate licensed mental health or medical support for issues such as severe depression, suicidality, self-harm thoughts, psychosis, substance dependence, domestic violence, unmanaged trauma symptoms, or any mental health crisis.

The coaching relationship does not establish a therapist-client relationship, and no guarantees or promises are made regarding specific outcomes. Felicia Shephard does not prescribe medication, provide medical treatment, or offer clinical diagnosis or therapy. The client understands and agrees that coaching may involve discussions of painful losses, unresolved emotions, family conflicts, relationship challenges, trauma-adjacent experiences, identity disruptions, anger, guilt, sadness, and other emotionally activating material. Participation may result in temporary distress, fatigue, or emotional discomfort.

The client acknowledges the potential for emotional triggers to arise during coaching. If at any point the client feels overwhelmed, anxious, depressed, or experiences thoughts of harming themselves or others, they agree to seek immediate support from a licensed mental health professional or emergency services. The client releases Felicia Shephard from any liability related to emotional distress or outcomes resulting from coaching sessions and agrees to seek professional help for issues outside the scope of coaching.

6. Emergency and Crisis Limitation

The coach isn't an emergency provider and doesn't offer 24 hour crisis response. If the client is in danger, feels unsafe, or has a mental health or safety emergency, they must call 911, dial 988, go to the nearest emergency room, or contact a licensed crisis professional immediately.

Client Initials:

For clients in Baldwin County and Mobile County, Alabama, local crisis resources include:

The Crisis Center (Central Alabama): 205-323-7777

Crisis Services of North Alabama: 256-716-1000

AltaPointe Health Crisis Line: 251-662-800

Connect Alabama: 888-421-1266

NAMI Baldwin County: (Text) 741-741

Crisis Text Line: Text HOME to 741741 (available nationwide 24/7)

The client understands that coaching services are not a substitute for emergency intervention, and it is their responsibility to seek immediate help if needed.

7. Confidentiality and Legal Exceptions

Your privacy and trust are very important to me. Information shared during coaching sessions will be held in the strictest confidence to the extent reasonably possible. I am committed to creating a safe, supportive space for you to share openly; however, please understand that confidentiality may be limited by applicable law, such as court orders, subpoenas, or situations involving suspected abuse or neglect. Additionally, if there is a reasonable belief that you may be at serious risk of harm to yourself or others, I am ethically and legally obligated to take steps to ensure your safety.

It's also important to recognize that coaching confidentiality does not carry the same legal privilege protections as licensed therapy or attorney-client relationships. My goal is to honor your trust and provide a safe environment where you feel heard, supported, and respected.

8. Communication and Boundary Policy

Our coaching sessions are the primary space for meaningful connection, reflection, and creating a personalized plan to support your growth and healing. While brief administrative or scheduling conversations may occur outside of our scheduled time, I ask that extensive coaching or emotional support through text, phone calls, emails, or social media be arranged only if explicitly agreed upon in writing.

Please understand that I am here to support you as your coach, but I am not a crisis contact or on-demand emotional responder. If you are experiencing a crisis or urgent need, I encourage you to seek immediate help from emergency services or mental health professionals. Respecting each other's boundaries helps create a safe, focused environment where healing, hope, and purpose can grow. Thank you in advance for honoring this space and our partnership.

Client Initials: _____

9. Coaching Service Options

Healing and personal growth are deeply personal journeys, and if I am honest, opening up about life's struggles, grief, emotions, and the things that quietly weigh on your heart is not always easy. It takes courage to be vulnerable, and I understand that trust and connection matter. Because of this, I believe it is important that you feel safe, comfortable, and supported by the person walking alongside you. I also understand that not every coach is the right fit for every individual, and that is perfectly okay. My desire is that you find the support that best meets your needs. That is why I offer a Free Introductory Call, a space for us to briefly connect and determine if *From Grief to Grace Coaching* feels like the right fit for your journey. No matter where you are in your journey, there is an option designed to support you.

Free Introductory Call - 15–20 Minutes | Free | Telephone Call Only

The introductory call is a brief, no-pressure opportunity for us to connect. During this time, we can discuss what brings you to coaching and I can answer questions about my style of coaching to help determine whether coaching together feels like a good fit for your needs and goals.

Please note: This call is not a coaching session, but rather an opportunity to build comfort, trust, and clarity before moving forward.

Discovery Session (1hr 15min) - \$85 (In person or Online)

The Discovery Session is your first official coaching session and serves as the foundation for our work together. During this time, we will walk through onboarding paperwork, explore your story, identify areas of focus, and begin establishing goals and direction for your healing and personal growth journey. Because this session is more in-depth and intentional, additional time is provided to ensure you feel heard, supported, and understood.

1:1 Coaching Sessions (50 min) - \$75 (In person or Online)

This is where the heart of our work begins. Our one-on-one coaching sessions are designed to help you move from awareness toward growth and intentional change. Together, we will process the challenges you face, identify those emotional patterns you didn't realize you had, strengthen those healthy habits, create necessary boundaries, work toward your personal goals, and create practical action steps that support your healing and growth. I want you to also know that our time together is a space for accountability, encouragement, and my continued support as you move forward. You will get there one step, one moment, and one breakthrough at a time.

1:1 Coaching Session Package Options:

To encourage consistency and provide continued support throughout your healing journey, I want to offer you a few discounted coaching packages available in person or online:

Package of 2 Sessions: \$140 (Save \$10)

Package of 4 Sessions: \$280 (Save \$20)

Package of 8 Sessions: \$560 (Save \$40)

Client Initials: _____

Please understand that consistency is so important and truly matters in your healing journey. When continuously show up for yourself over and over again growth, reflection, and intentionality often happen over time.

Session Payment

Great news! Your session appointments can be booked and paid for securely through my website: www.fromgriegtograncell.com

Clients may choose to pay in full at the time of booking or submit a **non-refundable deposit** to reserve their session. The deposit secures your scheduled session and protects your reserved appointment times. If you need to reschedule, I kindly ask that you communicate as soon as possible so we can work together to find another time that supports your schedule. If you paid the **non-refundable** deposit, please note that the remaining balance due for your scheduled appointment must be paid prior to your scheduled session.

10. Fees, Cancellation, Scheduling and Rescheduling

Session Fees

The standard fee for a 50-minute 1:1 coaching session is \$75.00. Coaching packages must be paid in full by the beginning of the first session and are valid for **six (6) months from the date of purchase** to encourage consistency and continued momentum in your journey.

Rescheduling & Missed Appointments

If you need to reschedule your appointment, I kindly ask for at least a **24 hours' notice** whenever possible. This allows flexibility in finding another appointment time that works for both of us. Missed appointments or cancellations without proper notice may be charged in full, as that time has been specifically reserved for you. Now, at the same time, I do understand that life happens and sometimes it happens in less than 24 hours, without a warning. My heart is to work with you on your journey, so I encourage open communication and commitment to the process of healing and growth.

Session Timing

Out of mutual respect for one another's time, sessions will begin and end as scheduled. If you arrive late, please understand that the session time cannot be extended beyond the originally scheduled appointment. I encourage you to please view this time as an **investment** in yourself, your healing, and your future. You do not have to walk this journey alone and I am honored to be the one you chose to walk alongside you.

11. No Guarantee of Results

Healing timelines and outcomes can vary greatly from person to person. My clients must understand that no specific results, such as emotional relief, reconciliation, or behavioral change, are guaranteed through coaching.

Client Initials: _____

The coaching process is designed to support your growth, deepen your self-awareness, and build resilience; however, individual progress depends on various individual factors, including your efforts, circumstances, personal accountability, and personal readiness. While I am committed to providing encouragement and tools to help you on your journey, ultimately, your healing and growth are a collaborative effort. I encourage patience and compassion with yourself as you move forward.

12. Termination of Services

Either party may choose to terminate the coaching relationship at any time. The coach reserves the right to discontinue services if the client's needs extend beyond the scope of coaching, if boundaries are repeatedly violated, if payment obligations are not met, or if the coach feels uncomfortable or believes that continued services are not a good fit for the client.

It is my hope that our work together remains respectful and supportive. If either of us decides to end the coaching relationship, I am committed to ensuring a smooth and respectful transition.

13. Hold Harmless and Release

To the fullest extent permitted by law, the client voluntarily assumes all risks associated with participation in coaching. The client agrees to release, indemnify, and hold harmless From Grief to Grace Coaching, From Grief to Grace LLC, and Felicia Shephard from and against any claims, losses, liabilities, damages, or expenses that may arise out of or relate to their participation in coaching services, except where such claims are due to willful misconduct or are prohibited by law.

If you have any questions about your rights or obligations under this agreement, you are encouraged to seek review by an independent legal professional.

14. Acknowledgment and Consent

By signing below, the client affirms that they have read this packet, fully understand the nature, scope of practice, and limitations of life and grief coaching services, and recognize that coaching is not a substitute for mental health treatment or medical care. The client has had the opportunity to ask questions and voluntarily agrees to participate under the above listed terms.

Client Name (Print): _____

Client Signature: _____

Date: _____

Coach Signature: _____

Date: _____

