

**NEW CLIENT INTAKE FORM**  
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**PERSONAL AND FAMILY RECORD**

To make our first meeting more productive, please give accurate and complete responses to every section of this form. If necessary, write additional information in the margins.

Date \_\_\_\_\_ Client Name \_\_\_\_\_ Age \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Birth date \_\_\_\_\_ Email \_\_\_\_\_ Is it ok to (check all that apply):  
☐ text, ☐ email, ☐ leave messages at home, ☐ messages on cell number?  
Phone (home) \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_ best time to call \_\_\_\_\_  
Employer \_\_\_\_\_ How long \_\_\_\_\_ Position \_\_\_\_\_  
Circle last year of school completed 9 10 11 12 GED College 1 2 3 4 Other \_\_\_\_\_

**Marital Status:**

Single, never married \_\_\_\_\_ engaged \_\_\_\_\_ living together- not married \_\_\_\_\_ separated \_\_\_\_\_, how long? \_\_\_\_\_ divorced \_\_\_\_\_, how long? \_\_\_\_\_ widow/er \_\_\_\_\_, how long? \_\_\_\_\_  
If Married \_\_\_\_ Spouse' name \_\_\_\_\_ Age \_\_\_\_ Occupation \_\_\_\_\_  
How long have you been married to this spouse? \_\_\_\_\_ Are you happy in this marriage? \_\_\_\_\_  
Total number of prior marriages for you \_\_\_\_\_ For your spouse \_\_\_\_\_

Children	Age	Sex	Relationship to You?	Live in your home?
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**How did you hear about me** \_\_\_\_\_ ? If referred by whom? \_\_\_\_\_  
What is your religious preference? \_\_\_\_\_ Church affiliation \_\_\_\_\_  
Pastor \_\_\_\_\_ How strong is the influence of church in your life? \_\_\_\_\_

**COUNSELING HISTORY**

Have you ever been to Counseling for any reason? Yes \_\_\_\_ No \_\_\_\_ What reason \_\_\_\_\_

\_\_\_\_\_ How long? \_\_\_\_\_ Counselor \_\_\_\_\_

Are you presently working with any other Counselor or Psychologist? Yes \_\_\_\_ No \_\_\_\_ What is the reason?

\_\_\_\_\_ How long? \_\_\_\_\_ Counselor \_\_\_\_\_

Are you involved in any other marriage counseling, family counseling, or support groups? Yes \_\_\_\_ No \_\_\_\_

Specify \_\_\_\_\_

If married, why did you choose to marry? \_\_\_\_\_

What key pivotal events have redefined your relationship? \_\_\_\_\_

\_\_\_\_\_

Do the two of you share physical touch, cuddling, hugging, love making? \_\_\_\_\_

What are the hot topics that trigger fights? \_\_\_\_\_

\_\_\_\_\_

**MEDICAL INFORMATION**

Family Physician \_\_\_\_\_ Psychiatrist/Psychologist \_\_\_\_\_

Are you taking any prescription drugs? Yes \_\_\_\_ No \_\_\_\_ If yes, state the drug name(s), type, and for what purpose: \_\_\_\_\_

Who prescribed the drug(s)? \_\_\_\_\_

How often do you see this doctor(s)? \_\_\_\_\_

Describe your physical health: ☐excellent ☐good ☐adequate ☐poor.

Have you ever been hospitalized for mental illness or substance abuse? Yes \_\_\_\_ No \_\_\_\_ If yes, for what reason? \_\_\_\_\_

\_\_\_\_\_ How long were you in treatment?

\_\_\_\_\_ Hospital name \_\_\_\_\_ How long ago?

\_\_\_\_\_ Did you continue with outpatient counseling? Yes \_\_\_\_ No \_\_\_\_

Name of counselor \_\_\_\_\_

## IMPACT OF LIFE CIRCUMSTANCES

Please circle LOSSES that you have experienced:

Death of: spouse, child, father, mother, sister, brother, grandmother, grandfather, friend.

Divorce Separation Broken engagement Suicide Miscarriage Abortion Infertility Bankruptcy Homelessness

Career or job loss Other: \_\_\_\_\_.

Circle any VICTIMIZATIONS you have experienced or been involved with:

Child abuse: physical, emotional, sexual, incest

Spouse abuse: physical, emotional, sexual

Abandonment Rape Robbery Assault Suicide attempt Auto or industrial accident

Major illness Surgery Physical disability Alienation, Other: \_\_\_\_\_

**Circle any PROBLEMS that concern you now:**

Relationship(s) with: Spouse Children Parents In-laws Co-workers Friends Teachers

Alcohol Street Drugs Prescription drugs Binge eating Excessive dieting or exercising

Shopping Work too much Procrastination Communication Depression Anger Grief

Gender identity Sex Career Loneliness Mood swings Self-esteem Codependency Stress Fear Anxiety

Feelings about church or God Other \_\_\_\_\_

## INTENSE EMOTIONAL DISTRESS

### Current Situation

Are you currently having suicidal thoughts? Yes \_\_\_\_ No \_\_\_\_ If yes, do you have a plan? Yes \_\_\_\_ No \_\_\_\_

Have you attempted suicide recently? Yes \_\_\_\_ No \_\_\_\_ Please explain \_\_\_\_\_

Are there current homicidal thoughts, plans or attempts? Yes \_\_\_\_ No \_\_\_\_ Please explain \_\_\_\_\_

Do you have a desire to cause pain to self or others? Yes \_\_\_\_ No \_\_\_\_ Please explain \_\_\_\_\_

Are you currently in fear for your life or personal safety? Yes \_\_\_\_ No \_\_\_\_ Please explain \_\_\_\_\_

Are you currently too depressed to care for yourself or family? Yes \_\_\_\_ No \_\_\_\_ Please explain \_\_\_\_\_

**Expectations for Therapy:**

**Briefly state the nature of the problem as you see it:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What changes would you like to make?** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**In signing below, I affirm that the information given on this form is true and complete.**

The undersigned, by providing his/her signature agrees to accept the therapy services provided by Julia Nelson, MA, LPCA, MFTA in accordance with and pursuant to the terms and conditions set forth in this agreement.

1) Name (Please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

2) Parent or Legal Guardian (Please print) \_\_\_\_\_

For Minor \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_