

Hello, and thank you for scheduling an appointment with me. Helping Americans build strong futures is what I have built my career on, and I'm delighted to be helping you now.

**Scheduling and Rescheduling:**

Once you have completed these intake forms, request an appointment through [www.julielacroix.com/contact](http://www.julielacroix.com/contact). I will reply within a day or two unless I am extremely busy. If you do not hear from me, I am either in a "swell" of clients and you are in my appointment queue, or, you can email me again poking me for an opening!

- For rescheduling appointments, please email me at [julie@julielacroix.com](mailto:julie@julielacroix.com)
- For same day rescheduling, please text me at (949) 554-5205 to bump to a different time that day or the next

**How it works:** In most cases, we meet twice. ***Once for the intake session*** and ***once for the resume session***.

**1st Appointment: The Intake Session**

The intake session is \$275 and that is where we do the bulk of your career design as follows:

- We analyze your experience and interests, and extract your most transferable skills
- We discover any underutilized talents, underrecognized interests, or underdeveloped skills
- We align your assets and potential with a growing career pathway, setting clear goals and trajectories

The intake session defines WHAT YOU HAVE and WHERE IT FITS, and WHAT ADDITIONAL TRAINING is necessary and available to you. My goal is, in very short but thorough order, to give you a clear vision for creating a meaningful and sustainable career... with traction allowing you to make progress immediately following our meeting.

**2<sup>nd</sup> Appointment: The Resume Session**

Please refer to the resume information provided below.

**FOLLOW UP SESSIONS:** Follow up sessions, if needed, are \$150. I endeavor to help you quickly; you've been stuck long enough. Sometimes a client needs a follow up session (or a few) to work more slowly on selecting and advancing their careers. Sometimes these follow up sessions are requested after the resume for additional support with salary negotiation, interview prep and onboarding to a new job environment.

**How do we meet?**

**For years I had an office in Southern California, but I am now working exclusively by phone.** I do not use Zoom or video calls. The intake session is conducted as a phone call, and I will always call you.

The resume session is also a phone call along with a Zoom screen share, which I will set up prior to our resume appointment. You do nothing on your end. I do not do video calls unless I am presenting to a group.

**The benefits of working by phone:**

My exposure working with clients across the country affords me a broad, applicable and current perspective on the economy, trends, and happenings in other regional and major metropolitan areas. I love knowing what's happening across the entire country and leveraging it to your advantage. Remote phone work is efficient and swift for career counseling.

**The paperwork:**

Download and review these intake forms and scan copies back to me just a few minutes before our meeting. Pictures or scans are both fine. No need to send them early, as we review them together.

**The appointment:**

I will call you from my land line (623) 825-7766 to the number you provide me when you confirm a time. I do my best to run on time, but sometimes clients need a little more and I do run over. If so, I will text you that I am running a touch late.

**What to expect and have for the meeting:**

Have a notepad and pen because we work quickly and cover a lot. I encourage you to take notes and bring an open frame of mind to our meeting. On the next 2 pages are the answers to more of your questions.

Please initial each line on the next 2 pages to indicate to me you have read both documents entirely.

Thank you for choosing to invest in career counseling. I look forward to working with you, helping you reach your full potential and setting a vision for your highest usefulness and purpose to our beautiful society.

Sincerely,  
Julie LaCroix



## PRICING, POLICY AND PAYMENT INFORMATION - Initial each line:

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### APPOINTMENT PRICING AND PROCESS:

- \_\_\_\_\_ Initial intake session is \$275 (50 MINUTES) and resume pricing is separate (listed below)
- \_\_\_\_\_ Follow up career counseling sessions (optional, as needed) are \$150 (50 MINUTES)
- \_\_\_\_\_ I usually meet with clients 2-4 sessions total (one for intake, one for resume), depending on their needs
- \_\_\_\_\_ Some clients like to do “check-in” appointments via phone for as-needed support in job search; These sessions are \$150 for 50 minutes, \$85 for 30 minutes, or \$45 for 20 minutes

### RESUME PRICING:

- \_\_\_\_\_ **Basic Resume (0-5 years, entry/junior/early-mid level, 30% of my clients):**  
\$650, or the resume package with LinkedIn profile is \$750
- \_\_\_\_\_ **Associate/Specialist Resume (5-8 years, re-entry, mid-level professional, 30% of my clients):**  
\$850, or the resume package with LinkedIn profile is \$950
- \_\_\_\_\_ **Management / Professional Resume (10+ years, Manager/Director, non-technical, 30% of my clients):**  
\$950, or the resume package with LinkedIn profile is \$1100
- \_\_\_\_\_ **Executive / Technical (10+ years, VP or higher, dense or complex resumes, (10% of my clients):**  
\$1200, or the resume package with LinkedIn profile is \$1400

### RESUME POLICY:

\_\_\_\_\_ All resume pricing is quoted based on a 2-hour resume session and for the skill level you need from me. I endeavor to complete all resumes in a 2 hour window. In most cases, the package will be completed in 2 hours.

\_\_\_\_\_ In the case of complex or dense resumes, it can take, at times, up to 4 hours to complete the service. In some cases it isn't until we actually roll up our sleeves and begin incorporating and organizing your skills and experience into the document before knowing the true complexity of the work. I reserve the right to charge an additional \$150 per hour above and beyond the quoted price.

\_\_\_\_\_ All resumes are considered complete by both parties via **email delivery** in both Word and PDF formats from my Windows PC. I am not responsible for technical incompatibilities with a PC or Mac.

\_\_\_\_\_ My resumes are delivered at 90% - the quality level is “Grade A,” but you are free to make slight edits and improvements based on feedback you receive during your job search.

### PAYMENT INFORMATION:

- \_\_\_\_\_ **FIRST CHOICE: Zelle** because it is a secure bank-to-bank transfer. You can access it through your online banking app or the Zelle app on your iPhone. (julie@julielacroix.com)
- \_\_\_\_\_ **SECOND CHOICE: Venmo** (Julie-LaCroix-1), **cash**, or **Square Cash Pay**. I prefer not to take checks because they now trigger holds for small businesses, but it is an acceptable form of payment.
- \_\_\_\_\_ I can accept all credit cards and the total amount is slightly higher (approximately \$5 per \$100 charge).
- \_\_\_\_\_ Payment is due at the time of service unless clear arrangements have been made in advance with me.

## Informed Consent for Career Counseling

**Scope of practice:** Career counseling is not therapy. It is a collaborative process intended to assist you with addressing current career concerns and refining strategies for developing your own career. Specifically, it includes clarifying a career direction and/or mobilizing a job search, in that order. \_\_\_\_\_

**Public contact:** As all of my work is confidential, I do not make contact with clients in public. If I don't wave hello, it is not intended to be rude, but to protect the confidential nature of our work together. \_\_\_\_\_

**Fees:** The intake session is \$275 and regular follow up sessions are \$150. Resume sessions are 2 hours and are priced between \$650-1400 depending on your level and the package. Julie reserves the right to increase the fee for a highly complex or technical resume or resume package. I have read this pricing and the pricing on the prior page. \_\_\_\_\_

**Payment:** Payment is due in full at the time of service, unless other clear arrangements are made with me. I suggest that you make out your check before each session begins, so our time together is optimized. \_\_\_\_\_

**Appointments and cancellations:** Kindly notify me within 24 hours if you will not be able to attend our session. There is no missed appointment fee. I try my best to reschedule you in the same week, but this is a very busy practice. \_\_\_\_\_

**Email, phone calls and other services:** Charges for other services done outside our meetings, such as research, writing job search materials, consultations with other therapists, or court-related services will be charged at regular fee schedule. Please limit emails and phone call requests for advice and edits, as I am rarely able to respond in a timely manner for your job search needs. Unfortunately I cannot keep up with these requests at this time. \_\_\_\_\_

**Credentials:** I hold the highest designation in the field of career counseling, the Certified Career Counselor (CCC) designation from the National Career Development Association. My education is as follows: B.A. in Psychology from UC Irvine, M.A. in Educational Counseling from Azusa Pacific University, graduate certificate in Clinical Counseling from Azusa Pacific University and Board Certified Coach from CCE. I am authorized to perform each of the assessments I use in my practice, which include Interest and Aptitude assessments. I initiated and completed 6000 hours of advanced training under the supervision of doctorate level practitioners in psychology and adult career development. \_\_\_\_\_

**Confidentiality:** All information disclosed within sessions, including that of minors, is confidential and may not be revealed to anyone without written permission except where disclosure is permitted or required by law. Disclosure may be required in the following circumstances:

1. When there is a reasonable suspicion of child abuse or abuse to a dependent or elder
2. When the client communicates a threat of bodily injury to others
3. When the client is suicidal
4. When there has been physical injury due to violence
5. When disclosure is required pursuant to a legal proceeding \_\_\_\_\_

**Electronic communication:** I cannot ensure the confidentiality of any form of communication through electronic media, and any email sent to me via a computer in a workplace environment is legally accessible by an employer. Your signature below constitutes full acknowledgement of this potential risk to your confidentiality, and a waiver of any liability on the part of Julie LaCroix for any breach of confidentiality resulting from electronic communication. \_\_\_\_\_

I have read, understand and agree to abide by the office practices, limits of confidentiality and financial arrangements as described in this consent form.

Client Signature (or Guardian of Minor): \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

## CAREER COUNSELING INTAKE FORM

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Name:

Date:

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Date of Birth:

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Home/Mobile Phone:

Is it ok to leave a message for you at these numbers? Y / N

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Work Phone:

Current occupation:

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Email:

Current Employer:

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Mailing Address:

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How were you referred?

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### CAREER INFORMATION

Please indicate your reason(s) for participating in career counseling:

- Desire to improve self
- Self – Assessment (Personality, Interests, Values, Skills)
- Need assistance in career/lifestyle decision-making
- Uncertain about career/lifestyle options
- Leaving the area. Desire to explore relocation and job search strategies
- Need to plan for the future
- Need to alter career/lifestyle goals
- Need to set long-range career/lifestyle goals
- Need for occupational/vocational information
- Need for labor market information
- Desire to prepare for a position change (i.e., promotion, demotion, transfer, etc.)
- Experiencing career related discrimination
- Job terminating. Desire to explore job search strategies
- Job search assistance
- Career stress
- Job dissatisfaction due to job duty assignments
- Job dissatisfaction due to interpersonal relations with peers or supervisor
- General life dissatisfaction
- Relationship pressures (spouse/partner, parents, children, peers, etc.)
- Other:

Please rate your present level of satisfaction with the following life areas:

<b>Life Area</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Dissatisfied</b>	<b>N/A</b>
Work				
Physical health/well-being				
Emotional & Mental health				
Finances				
Spirituality/religion				
Relationships with spouse/significant other				
Relationship with children				
Relationships with boss or coworkers				
Social network/friendships				
Leisure & Travel				
Values/Purpose/Passion				
Role Issues				

What are your present career aspirations? Assume no barriers to achieving them.

Why are you seeking career counseling at this time?

Who or what has had the greatest influence on your career choice(s)?

What was your childhood occupational interest or fantasy?

What degree or training certifications do you hold?

What leisure activities or hobbies, volunteer work, or civic involvement do you enjoy now and/or have you enjoyed in the past?

Do you have any physical limitations? (List conditions and their effect on your career development)

What aspects of your work situations have been most satisfying? (i.e. salary, autonomy, coworkers, tasks, responsibility, variety, etc.)

What do you consider to be your strengths?

What do you like most about yourself?

What are effective coping strategies that you've learned?

Please attach a resume, or if you don't have one, complete the next page.

BASIC HISTORY OF WORK, LIFE EXPERIENCE OR VOLUNTEERING

**(\*\*\*Only complete if you do not have a copy of your resume to bring\*\*\*)**

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DATE RANGE:

JOB TITLE/ROLE YOU HELD:

COMPANY/SCHOOL/ORGANIZATION:

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