

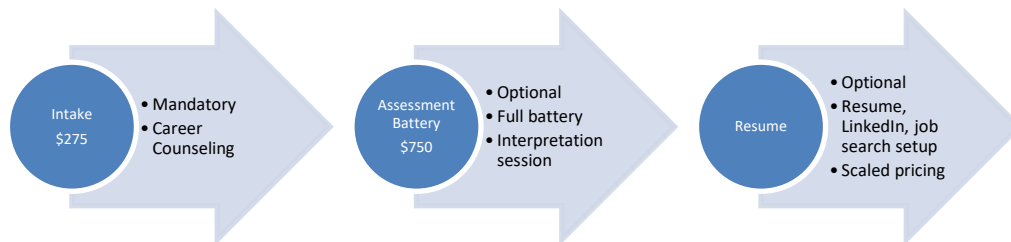
Hello, and thank you for scheduling an appointment with me! Here's what you need to know:

Scheduling and Rescheduling:

Complete these intake forms and get in my appointment queue at www.julielacroix.com/contact.

- Need to reschedule? Shoot me a text (949) 554-5205 or send me an email julie@julielacroix.com

How it works: My goal is to get you the clarity you need in one, two or three sessions only:



Don't know what you need? Start at the intake appointment and I will be able to help guide you after the intake appointment, if anything. Sometimes, one session is all you need.

1st Appointment: The Intake Session

The intake session is \$275 and the critical first step in getting you the clarity you are looking for:

- 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
- You decide if you'd like to continue with a **full battery of assessments**, a **resume appointment**, or **both**

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.

Follow-up appointments are \$150/hour: For further clarity, support, career changes, tune-ups, or accountability.

How do we meet?

For years I had a physical office, but I now work exclusively by phone and screenshare. **I will always call you.**

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: Scan/text/email your forms back to me **just a few minutes before our meeting**. No need to send them early, as we review them together.

The appointment:

I will be calling you from my cell phone (949) 554-5205 to the number you provide me. 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:

Be ready to take notes, because we work quickly and cover a lot. 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:

Initial all lines to acknowledge:

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)
- _____ Full battery of assessments is **\$750** with 4 assessments (Aptitudes, Interests, Workstyle and Values) and includes an interpretation session. You will receive copies of your results with my markups.
- _____ I usually meet with clients **2-4 sessions total** (one for intake, one for resume, etc.), depending on 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

ASSESSMENT PRICING:

The full battery of assessments is a deeper dive into career self-discovery. It is useful to further understand yourself, helpful for interviewing, and gives you great language for the resume and elevator pitch.

- _____ \$750 for a full battery of assessments including:
 - Aptitudes, Interests, Workstyle, Values and a follow up interpretation appointment

RESUME PRICING:

Having me help you reset your LinkedIn is a smart choice. There are settings and keyword tricks you most likely aren't familiar with, and I can set up your job search to match your goals, making a very easy start for you:

- _____ **Basic Resume (0-5 years, entry/junior/early-mid level, 30% of my clients):**
\$650, or the resume package with LinkedIn profile and job search setup is \$850
- _____ **Associate/Specialist Resume (5-8 years, re-entry, mid-level professional, 30% of my clients):**
\$850, or the resume package with LinkedIn profile is \$1100
- _____ **Management / Professional Resume (10+ years, Manager/Director, non-technical, 30% of my clients):**
\$1050, or the resume package with LinkedIn profile is \$1350
- _____ **Executive / Technical (10+ years, VP or higher, dense or complex resumes, (10% of my clients):**
\$1350, or the resume package with LinkedIn profile is \$1700

_____ **Quite often I adapt, reduce or adjust pricing to target your specific needs, situation and complexity.**

RESUME POLICY:

- _____ Resumes can take 2-3 hours depending on complexity, and will be job-search ready upon delivery.
- _____ In the case of complex or dense resumes, it can take, at times, several 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 **email delivery** in Word and PDF formats from my Windows PC. **I am not responsible for technical incompatibilities between my PC and your 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** is a secure bank-to-bank transfer. If you bank with a major bank (Wells Fargo, BofA, Chase), this is my preference (julie@julielacroix.com). **If you bank with a credit union, please use Venmo.**
- _____ SECOND CHOICE: **Venmo** ([Julie-LaCroix-1](#)) or **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 appointment is \$275 and regular follow up sessions are \$150. A full battery of assessments is \$750. Resume sessions are 2-3 hours and are priced between \$650-1700 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. Payment is expected at the end of our appointment, but you are welcome to send it prior if you prefer. _____

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

Name:

Date:

Current Age:

Cell Phone:

Current Occupation:

Current Employer:

College: Y / N / Some

Degree/School:

Email:

How were you referred?

CAREER INFORMATION

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

- ☐ Desire to improve self
- ☐ Self - Assessment (Skills, Strengths, Growth Potential)
- ☐ Looking for formal career assessment testing (Aptitudes, Interests, Workstyle, Values)
- ☐ 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:

Life Area	Very Satisfied	Satisfied	Dissatisfied	N/A
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***)**

DATE RANGE:

JOB TITLE/ROLE YOU HELD:

COMPANY/SCHOOL/ORGANIZATION:

DATE RANGE:

JOB TITLE/ROLE YOU HELD:

COMPANY/SCHOOL/ORGANIZATION:

DATE RANGE:

JOB TITLE/ROLE YOU HELD:

COMPANY/SCHOOL/ORGANIZATION:

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