

Executive Self-Reflection Intake Form

Client Reflection & Advisor Assessment Version

Section A: Current Context (Client Reflection)

1. What is your current role and primary responsibility?

2. What prompted you to seek advisory support at this stage?

3. What decision, transition, or situation feels most pressing?

Section B: Strategic Clarity

Client Self-Rating (1–5) & Reflection:

Statement	Client Score (1–5)
I am clear about my professional direction.	
My current role aligns with my long-term aspirations.	
I make high-stakes decisions with confidence.	
I feel strategically in control of my professional trajectory.	

Client Comments:

Advisor Scoring & Observational Notes:

Section C: Emotional Stability Under Pressure

Client Self-Rating (1–5):

Statement	Client Score (1–5)
I manage stress effectively.	
I recover quickly from setbacks.	
I remain composed during conflict.	
I sleep well despite work demands.	
I experience minimal stress-related physical symptoms.	

Client Comments:

Advisor Risk Assessment (Low / Moderate / High):

Final Advisory Judgment

Primary Stress Drivers Identified:

Leadership Behaviour Patterns Observed:

Risk Level Classification:

Recommended Advisory Direction:

Suggested Engagement Duration:

Confidential Strategic Notes:
