

Rockport Institute

CLIENT INFORMATION FORM

Name _____
First Last Name you like to be called

Phone _____
Home Work Fax E mail

Address _____

Today's date _____ Your date of birth _____

Family information:

Marital status: (Circle one) single married divorced separated committed relationship

If married or in a committed relationship, which of the following statements best represents your partner's support of your work with us:

{ ___ Actively supports me to become and do what I want in my life. } { ___ Passively supports me. }
{ ___ Supports me but thinks they know what is in my best interests better than I do. } { ___ Is neutral. } { ___ Does not support me. }

Children (Names and ages)

Please answer the following questions about your family. (If any family members are retired or deceased, put down the occupation that best characterizes their former career.)

Spouse's occupation _____ Education _____

Father's occupation _____ Education _____

Mother's occupation _____ Education _____

Number of brothers ___ Ages _____ Occupations _____

Number of sisters ___ Ages _____ Occupations _____

**IMPORTANT! Please attach your résumé to this form.
Please do this even if you have given us one previously.
If you do not have an up-to-date résumé, please include a
summary of your work history and education.**

What do you do in your current occupation?

What do you like about your work?

What do you like least about your work?

In what ways does your present work fall short? What is missing?

Why are you considering changing careers at this time?

How is your financial situation? Are you prospering, just making ends meet, falling behind or going under? How much of your desire for change is related to your financial condition?

What are your strongest talents?

What and how much do you read for pleasure. Please be specific. List subjects read, types and names of publications, etc. Use the back of this form if you need more room.

What would people who know you well say are your most positive or special qualities, attributes and personal characteristics?

What do you not do well? What are the areas where you have no talent?

What would people you know say are the attributes or qualities that can or do cause you the most trouble or mischief in your life?

Are there other issues that might contribute to your situation or the way you perceive it?

What personal or health problems do you have that affect or could affect your career?

What are the key elements and criteria for a career/occupation that would be ideal?

What circumstances affect your choice of occupations?

If there were no limits placed on you by your education, skills, finances, etc., what would you be, do or have?

If you discovered that you had only five years to live, how would you spend those years?

What are your fondest interests and the most important passions in your life?

**Please read the following
and sign and date this form in the appropriate place.
We cannot process your testing materials if you forget to do so.**

**INFORMATION ABOUT YOUR PROGRAM
AND POLICIES AND AGREEMENTS BETWEEN YOU AND ROCKPORT INSTITUTE**

In the approximately twenty years since Rockport was founded, we have had more than 10,000 clients. Fewer than 10 have expressed dissatisfaction or asked for a refund. That adds up to a satisfaction rate of better than 99.9%, a percentage rate almost unheard of in consumer advocate circles. Nevertheless, the lawyers say we must have clear written agreements with our clients. We apologize for this. Please read the following and sign at the end.

ROCKPORT INSTITUTE CAREER TESTING AND COACHING

Rockport tests consist of educational methods and materials representing theories that are developing but not proven. (This is also true of all other educational and psychological testing methods.) Rockport testing and career coaching programs are designed to be used as a method of personal discovery, a way of "holding up a mirror of possibility" so that the you can look into your life experiences and use your own insight and experience to recognize and understand your innate talents and personality traits. Our founder, Nicholas Lore, has always told his clients: "Do not believe anything I say. You must look into your own life, and your own experiences to validate what we are saying. Then you must make your own decisions based on what you see, not on what we say." You agree to that point of view and that you are entirely responsible for the results you get from your relationship with Rockport Institute and any decisions you make as a result. We do not share in that responsibility. We do not make any claims or offer warranties other than what is stated in this agreement.

Rockport testing materials are only to be used as an adjunct to career decision making explorations by private individuals. We do not allow their use as any part of a hiring, firing, job promotion or academic selection process. The only permissible use of Rockport materials other than with private individuals is when they are used in a corporate or educational setting as aids to help the employee or student make their own, individual decisions about their future direction.

Under no circumstances short of a court order will Rockport Institute reveal any information about a client. Rockport will hold in the strictest confidence all information including clients' names, contact information, test scores and background material.

THIS PARAGRAPH APPLIES TO CAREER CHOICE PROGRAM CLIENTS

The Career Choice Program includes testing, interpretation and up to seven following sessions. However, we do not limit the client to seven sessions so long as they are participating fully and keep working continuously in a committed way to decide on their future career. Some clients take more than seven sessions, some reach a decision in a very few sessions. The fee for the Career Choice Program purchases this "no limit" commitment from us. We do not offer a refund if the client uses fewer sessions or stops participating for any reason except a major failure on our part to provide services as specified in this agreement. The sliding scale for the Career Choice Program is a gift from Rockport based on our commitment to not turn away people who want to participate in the Career Choice Program because of their financial situation. The sliding reduced fee applies only to clients who participate in the entire Career Choice program.

Rockport asks that you provide at least 24 hours notice if you cannot keep a scheduled appointment. Except in case of emergency, a later cancellation will be counted as a session.

ARBITRATION AGREEMENT

I agree that any controversy or claim arising out of my relationship with, and/or participation with, and/or any associated activity, and/or this or any other contractual agreements with Rockport Institute, its employees, officers, agents and/or including the interpretation, execution, application, and enforcement of this Arbitration Agreement, will be determined by submission to arbitration in accordance with the rules of the American Arbitration Association in the City of Rockville, MD, USA and not by lawsuit or resort to court process except as law provides for judicial review, confirmation and enforcement of arbitration proceedings. This Agreement includes arbitration of claims that there may have been any wrongful acts or omissions, intentional or otherwise, by Rockport Institute, Ltd., its officers, directors, employees, agents and/or volunteers, and/or Nicholas Lore. The decision of the arbitrators may be entered into any court having competent jurisdiction of such matters. BY SIGNING THIS I AM AGREEING TO HAVE ANY ISSUE OR CLAIM ARISING OUT OF MY PARTICIPATION WITH ROCKPORT INSTITUTE, LTD. AND/OR NICHOLAS LORE DECIDED BY NEUTRAL ARBITRATION AND I AM FREELY GIVING UP MY RIGHT TO A JURY OR COURT TRIAL.

I agree to the above policies and agreements. I have received my own copy of this agreement.

..... Signature

..... Date

If the client is a minor, their legal guardian must both print and sign their name and write "Legal Guardian" after the printed name.

The following (and last) page of this form is your copy of this agreement. Please tear it off and keep it.

**This is your copy of the agreements on the previous page.
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