

**NEW CLIENT QUESTIONNAIRE  
LOCAL 2021 2<sup>nd</sup> edition**

This helps me tailor your plan to you  
Just ignore the questions that don't apply to you.  
The following are the things I need to know. You can elaborate on anything you want.  
Believe me, I've seen and heard everything and done a lot myself. : )

Face to face is NO LONGER ON HOLD due to the pandemic but if you still want to work remotely during this time I can. I have worked remotely with people for 29 years so I am very used to it.

Email this back to me at [lisa@lisamerrill.com](mailto:lisa@lisamerrill.com) or

You can fax it to me too 1-877-287-7216

**TEXT OR CALL ME THE SECOND YOU SEND IT SO I HAVE A HEADS UP**

My cell number is 734-502-8264 (Verizon if that matters)

I am a texting queen too. ☺

FEEES for face to face session (or hybrid with phone time)

1 hour (meal plan set up, support materials and phone session) \$125

1.5 hours (more extensive and more phone time) \$165

2 hours (more extensive – mostly for face to face) \$200

Follow up sessions or phone sessions (20-30 min) \$35

**MEDICARE covers diabetes sessions- even remote ones right now!!!**

**And MESSA is very good about covering all sessions**

**FLEX SPENDING and HEALTH SAVINGS ACCOUNTS can be used too**

**Installments are totally fine for tight budgets- just let me know ahead of time. Believe me I understand! I have started over from scratch a few times in my life too ☺**

For continuous support- If you want to send me daily food diaries \$15/month

I have paypal, venmo, zelle accounts, and checks & credit/debit cards are fine too.  
My accounts are my email [LISA@LISAMERRILL.COM](mailto:LISA@LISAMERRILL.COM) (don't forget the 2 R's and 2L's)

Or my cell 734-502-8264. If you want to pay by check, I can text you my home address or you can send to my Wyandotte office.

I agree to these fees \_\_\_\_\_ (initial and date here)

## **NAME AND WHAT YOU PREFER TO BE CALLED IF IT'S DIFFERENT**

## **ADDRESS**

## **PREFERED EMAIL ADDRESS**

## **PHONE**

## **DO YOU TEXT?**

## **ABOUT YOU**

- Any “story” or history that you think is important that I should know and help me get to know and understand you better. You can include weigh history, life altering events, any gastric bypass/sleeve surgery etc
  
- Age
- Height
- Weight/size
- Where you want to be, if you're not there yet. And if you don't know we can always come up with something and re-negotiate it later

Anything I need to know about your job, your schedule, kids, etc

## **MEAL PLAN**

- Do you want 3 meals and 3 snacks
- Or just 3 meals

- Or any combination
- What time do you normally eat your meals?
- What is your current plan if you have one?
- What do you like about it, or want to change?
- What foods do you currently plug in to this plan?
- Any food allergies?
- What are your trigger foods/what is NOT safe?
- What are your favorite (non trigger) foods?
- What non trigger foods do you hate? ( so I won't keep mentioning them!)
- Any cultural situations I need to take into account? (ie Jewish/Observant)  
Or vegan, vegetarian (what kind- lacto, ovo, pesca)
- Is it "safe" for you to know your calorie level or do you want me to keep this to myself? You won't be counting calories or anything, that's my job. I have a form that shows my calculations that I put in packs OR DON'T put in the packs if it's not healthy for you to know. \_\_\_\_\_  
(people who answer "don't know" I don't tell..... for now)

## **MEDICAL HISTORY**

- Anything medically I should know that wasn't mentioned initially?

- Medications?

**EXERCISE** (let me know what you do even if you're not having me do the exercise assessment, I need to know so I make sure your calories are appropriate based on your activity). If I am doing the assessment please be detailed.

- Any orthopedic limitations to exercise or medical issues?
- What do you like to do?
- What do you not like to do?
- Have access to at a gym or home gym?
- Wish to learn?
- Anything else you have an opinion on (exercise or not...I've had some funny things written here!!!! I love it!)
- Any "deal breakers" (example- vegan, or "gotta have my creamer in my coffee or a cup of nut milk for tea during the day")

Thank you!!!! Looking forward to working with you  
Lisa