

NEW CLIENT QUESTIONNAIRE
OUT OF STATE/INTERNATIONAL 2023 2nd edition

The following information and questions will help me tailor your plan for you!
You can elaborate on anything you want.
Believe me, I've seen and heard everything and done a lot myself. 😊

Email this back to me at lisa@lisamerrill.com or
You can fax it to me too 1-877-287-7216

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

734-502-8264 (Verizon if that matters) EASTERN time zone.

“I am a texting queen too” 😊

- My fee is \$250 for the nutrition plan (which I email first), and mailed info pack which contains hard copies of everything plus support material.
- This ALSO includes 6 weeks unlimited phone/email/text time, as we settle on the plan.
 - Add an exercise plan + \$25
 - Additional charges after 6 weeks (see below)

I require a \$100 deposit -or paid in full (moves you up the list!) before I start on a plan. You can negotiate this with me ahead of time.
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 😊

- Continuous support- sending me daily food diaries \$15/month
- Meal plan updates after the initial set up time \$15-25
 - Phone sessions after the initial set up time \$40

Quickie emails and texts and “how do I count this” type of things I don't charge for, but most people pop \$15-25 online or a card after they feel they have asked quite a bit.

I have paypal, venmo, zelle accounts. Checks & credit/debit cards are fine too.
Health Savings/Flex spending does cover my services.

@LISA-MERRILL-20 for VENMO
Paypal and Zelle are my email 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 address.

I agree to these fees _____ (initial and date here)

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

And if your name can be gender neutral...are you male or female? (Or identify as?)
I always have to ask this with Jordan's, Shawn's, Glenn's, Pat's, and some international names I'm not sure of.

FULL ADDRESS (house number, street, city, state, zip) or international codes

I mail internationally too, so please give me every bit of info for the letter carriers.

PREFERRED EMAIL ADDRESS

PHONE

DO YOU TEXT?

Just ignore any questions that do not apply to you- or write does not apply or N/A
I use this for a lot of different situations

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
- Anything I need to know about your job, your schedule, kids, etc (ok to finish on a another page if you need more space)

- 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

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 eat on this plan?

- Any food allergies?

- What are your trigger foods/what is NOT safe? (trigger= can't stop eating it)

- What are your favorite (non trigger) foods?

- What non trigger foods do you hate? (So I won't keep mentioning them!)

- Any cultural/heritage situations I need to take into account?
Religious customs/ceremonies that involve your food?
Example- Jewish/Observant ...Shabbos, lots of holidays!!
Italian, Mexican, Asian cooking, Ramadan or Catholic fasting?

- Vegetarian or Vegan? LACTO = I eat dairy, OVO = I eat eggs
PESCA = I eat fish
VEGAN- I eat no animal products whatsoever.
- 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?

LAST NOTES/INFO GATHERING

- On a scale of 0 (not at all important) to 10 (extremely important)
How important do you think it is to take care of your health right now _____
- On a scale of 0 (not confident at all) to 10 (extremely confident) _____
How confident are you that you will be able to work program?
Or with just Lisa/support team if not doing program?

- Any comments about the last 2 questions?

Lisa's comments – have REALISTIC OPTIMISM. “I will succeed but it will be hard at times”. Use growth mindset language. Grow, progress, become, overtime, improve, develop. We do not have to be perfect to be successful. Baby steps are fine too! And my ultimate goal for all my people is “TO BE AS FLEXIBLE AS POSSIBLE BUT YOU STILL FEEL SECURE”.

- Anything you are interested in learning? (from me or in general)
- 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- I am vegan, or “gotta have my creamer in my coffee or a cup of nut milk for tea during the day”)

Thank you!!!! I know this was a lot to look at and fill out, and hopefully got you thinking!
Looking forward to working with you. 😊
Lisa