



CLIENT PRIVATE PROFILE

FIRST IMPRESSION:

☐ GREEN

☐ AMBER

☐ RED

Recommendation: To be progressed to next step? Yes ☐ No ☐

BEC UK Questionnaire

Client Discovery & Personal Development Assessment

SECTION 1: PERSONAL DETAILS

Title (☐ Mr ☐ Mrs ☐ Miss ☐ Other)	
First Name	
Surname	
Date of Birth	
Gender (☐ Male ☐ Female ☐ Prefer not to say)	
Address:	
Contact Number / Email	

SECTION 2: CURRENT SITUATION

Current Occupation	
Employment Status: ☐ Employed ☐ Self-employed ☐ Student	Others:
Years in Current Role	
Satisfied with Current Situation? (☐ Yes ☐ No)	If No, why:

SECTION 3: CLARITY & SELF-DISCOVERY

How clear are you about the following:

Area	Very Clear	Somewhat Clear	Not Clear
Career Direction	☐	☐	☐
Personal Strengths	☐	☐	☐
Income Goals	☐	☐	☐
Life Purpose	☐	☐	☐

Challenges (tick all that apply):

☐ Lack of direction ☐ Low confidence ☐ Career confusion ☐ Financial instability

☐ Business struggles ☐ Other: _____

SECTION 4: GOALS & ASPIRATIONS

What do you want to achieve in the next 6–12 months?

☐ Better job ☐ Start business ☐ Increase income ☐ Gain clarity ☐ Improve confidence ☐ Learn skills

Describe your main goal:

SECTION 5: INCOME & FINANCIAL GROWTH

Current Monthly Income (Net of deductions):	
Desired Monthly Income:	
Open to new income opportunities?	(☐ Yes ☐ No)

Interest Areas:

☐ Employment ☐ Business ☐ Digital income ☐ Skills ☐ Investment ☐ Passive Income

SECTION 6: SKILLS & DEVELOPMENT

Areas to improve:

☐ Communication ☐ Leadership ☐ Digital ☐ Business ☐ Confidence ☐ Problem-solving

Do you believe you are using your full potential now? ☐ Yes ☐ No ☐ Not sure

SECTION 7: SUPPORT & EXPECTATION

Support needed:

☐ Career guidance ☐ Business ☐ Income strategy ☐ Clarity ☐ Mentorship ☐ Job placement

Preferred method: ☐ In-person ☐ Online ☐ Hybrid

SECTION 8: READINESS & COMMITMENT

Are you ready to invest (Time, Resources & Energy) in achieving a better lifestyle for your family? (☐ Yes ☐ No)

Willing to take first step? (☐ Yes ☐ No)

FINAL NOTES

Further insight on your pathway to brighter future

- What does brighter future mean to you: _____

- What's your life experience: _____

- What's your life ambition: _____

- What are your fears: _____

- Do you have any specific ideas you would like to share: _____
