FolarraStudio

Private Practice Planner

schedule · bill · grow

PRINTABLE · CLIENTS, JOBS & MONEY

This Planner Belongs To

for counsellors, coaches and therapists in private practice

BUSINESS NAME _____

OWNER _____

PHONE / EMAIL _____

SERVICE AREA _____

STARTED ON _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Enquiry Form and Client list pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Fill in a client profile for each new client and log every job on the day.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My business word for this year

Why I love this work

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Enquiry Form

details for every new client

CLIENT _____ PHONE _____

ADDRESS _____ EMAIL _____

DATE _____ REFERRED BY _____

Reason for contacting

Availability

Payment / insurance

Follow-up

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
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- [ ]
- [ ]
- [ ]

Client List

everyone you work with

CLIENT	PHONE	EMAIL	SINCE	NOTES

Client Admin Cards

the details that matter

CLIENT ID _____

START DATE _____

SESSION DAY _____

FEE _____

PAYMENT METHOD _____

SESSIONS TO DATE _____

ADMIN NOTES _____

CLIENT ID _____

START DATE _____

SESSION DAY _____

FEE _____

PAYMENT METHOD _____

SESSIONS TO DATE _____

ADMIN NOTES _____

CLIENT ID _____

START DATE _____

SESSION DAY _____

FEE _____

PAYMENT METHOD _____

SESSIONS TO DATE _____

ADMIN NOTES _____

CLIENT ID _____

START DATE _____

SESSION DAY _____

FEE _____

PAYMENT METHOD _____

SESSIONS TO DATE _____

ADMIN NOTES _____

Session Log

every job, recorded

DATE	CLIENT ID	TIME	TYPE	FEE	PAID
					☐
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Services & Prices

what you offer

SERVICE	PRICE	TIME	NOTES
Initial consultation			
Standard session			
Extended session			
Couples session			
Late cancellation			

Weekly Schedule

the week at a glance

WEEK OF _____ NOTES _____

TIME	MON	TUE	WED	THU	FRI	SAT	SUN
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							

Enquiry Log

new client enquiries

DATE	INITIALS	SOURCE	BOOKED	FOLLOW UP	NOTES
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Billing Tracker

invoices and payments

MONTH	CLIENT ID	SESSIONS	BILLED	RECEIVED	OUTSTANDING

Practice Goals

grow a sustainable practice

Caseload goal

Marketing

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Training & CPD

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Self care

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Invoice Tracker

get paid on time

INVOICE NO.	CLIENT	DATE	AMOUNT	DUE	PAID
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					☐

Income & Expenses

money in, money out

MONTH _____ GOAL _____

DATE	DESCRIPTION	CATEGORY	IN	OUT

TOTALS _____

Yearly Overview

the business at a glance

YEAR _____ GOAL _____

MONTH	JOBS	INCOME	EXPENSES	PROFIT	NEW CLIENTS
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					
Total					

Notes



FolarraStudio

Thank you!

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