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| **Bowen Intergenerational Family Therapy Conceptualization 4.0** |

*For use with individual, couple, or family clients*

**Date:**       **Clinician:**       **Client/Case #:**

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| **Introduction to Client & Significant Others**  |

*Identify significant persons in client’s relational/family life who will be mentioned in case conceptualization:*

**Adult(s)**

Adult Age: Gender:       Ethnoracial identity:       Occupation:       Additional identifiers:

Adult Age: Gender:       Ethnoracial identity:       Occupation:       Additional identifiers:

**Child(ren)**

Child Age: Gender:       Ethnoracial Identity:       School/Grade:       Additional identifiers:

Child Age: Gender:       Ethnoracial Identity:       School/Grade:       Additional identifiers:

Child Age: Gender:       Ethnoracial Identity:       School/Grade:       Additional identifiers:

Others in Household/Family/Significant Persons:

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| **Presenting Concerns** |

*Client’s Description(s) of Problem(s):*

Adult Age:

Adult Age:

Child Age:

Child Age:

Child Age:

Additional:

*Broader System Problem Descriptions:* From referring party, teachers, relatives, legal system, etc.:

Extended Family:

Name:

Name:

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| **Background Information** |

*Trauma/Abuse History (recent and past):*

*Substance Use/Abuse (current and past; self, family of origin, significant others):*

*Precipitating Events (recent life changes, first symptoms, stressors, etc.):*

*Related Historical Background (earlier incidents, family history, related issues, prior treatment, etc.):*

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| **Emotional Triangles and Cutoff** |

[ ]  Triangles within current partnership: Describe:

[ ]  Triangles with family of origin: Describe:

[ ]  Other triangles:

[ ]  Emotional cut-offs in extended family: Describe all:

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| **Intergenerational Patterns from Genogram** |

*Construct a family genogram and include all relevant information including:*

* Names, ages and birth/death dates
* Relational patterns
* Occupations
* Psychiatric disorders and alcohol/substance abuse
* Abuse history
* Personality adjectives

*3-generation genogram should be attached to report. Summarize key findings below:*

Substance/Alcohol Abuse: [ ]  NA [ ]  History:

Sexual/Physical/Emotional Abuse: [ ]  NA [ ]  History:

Parent/Child Relations: [ ]  NA [ ]  History:

Physical/Mental Disorders: [ ]  NA [ ]  History:

History Related to Presenting Problem: [ ]  NA [ ]  History:

Describe family strengths, such as the capacity to self-regulate and to effectively manage stress:

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| **Patterns of Differentiation and Fusion** |

*Describe how the couple/family promotes togetherness and separateness; provide examples:*

*Describe each person’s relative level of differentiation and ability to effectively manage conflict without reactivity; provide examples:*

*Describe patterns of fusion, in current and past generations; provide examples:*

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| **Sibling Position** |

*Describe sibling position patterns that seem to be relevant for the family, current, and earlier generations:*

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| **Family Projection Process** |

*Describe evidence of parental projection onto their child(ren), such as emotionally reactive behavior between family members; describe how it relates to symptoms, etc.:*

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| **Multigenerational Transmission Process** |

*Describe multigenerational transmission of functioning, attending to acculturation issues, residual effects of trauma and loss, significant legacies, use of alcohol and drugs etc.:*

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| **Multigenerational Patterns Informed by Diversity Factors** |

*Describe how multigenerational patterns are informed by relevant diversity factors, including those related to cultural, ethnicity, racial, immigration, acculturation, religious, socio-economic, ability, and sex/gender identity:*