



As a family lawyer for more than 30 years, I'm in the trenches daily with hurting people who walk into my office, full of fear. They wonder what divorce means for them, and they look to me to guide them. As a lawyer, I've felt "equipped" to advise them in the complex financial aspects of divorce.

About seven years ago I got a call from CDFA Cindy Gleason, a childhood friend I hadn't seen in years. One of my divorce clients had gone to Cindy for post-divorce financial management. It prompted Cindy to contact me to reconnect, and over lunch she explained her CDFA designation. Immediately I saw all the things she could do for my clients, and our subsequent collaboration has revolutionized the way I practice law.

Working on cases with Cindy has allowed me to craft more comprehensive and customized results in trial and settlement of divorces. I've expanded my knowledge of financial instruments and tax consequences, and even developed a healthier relationship with money myself. Perhaps the most gratifying aspect of our work together is how we assist clients in managing money-related anxieties and the fear of scarcity following divorce.

In my book, *The Compassionate Lawyer* (Amazon) I challenged my fellow attorneys to drive our legal practices from a base of compassion. In my work with Cindy, we keep compassion for clients at the forefront and our work changes lives.

What is compassion?

"Compassion" is usually defined as a sense of the deep awareness of the suffering of another, accompanied by a strong desire to alleviate that suffering. According to biblehub.com, in the original Greek, the transliteration of compassion is "esplanchnisthē." This Greek definition literally means "the inward parts, especially the nobler entrails—the heart, lungs, liver and kidneys." This means that one feels true compassion deeply, "from the gut."

As a result of collaborating from a base of compassion, in addition to better outcomes, our clients have

much better experiences in the divorce. By partnering towards compassion, lawyers and CDFA teams can be world changers.

How can we be compassionate in our work together?

1. We can take care of ourselves.

Let's face it; our work is intellectually and emotionally taxing. Our clients are experiencing grief, betrayal, fear, anxiety, and a myriad of other negative emotions when we meet them. We must explain complex concepts to them while simultaneously helping them navigate these emotions, all along realizing our work with them impacts their life trajectory. And we do all this in a fast-paced legal environment, sometimes culminating in trial.

Our work requires stamina, clarity, and balance. To endure in a long career in divorce work we have to be taking care of ourselves. This means getting ample sleep, eating healthy, life-sustaining, clean food, and having some form of regular exercise. We also need a spiritual practice as we define it. Examples are meditation, prayer, silence, disconnection from technology, connection to nature, or other avenues that give us deep internal rest. We must commit to these practices on a regular basis making sure they claim a non-negotiable spot on our busy calendars.

2. We can exercise self-compassion.

Even the best self-care won't prevent the occasional mistake, challenging us to have resiliency, the ability to forgive ourselves, and move on. Have you ever been testifying about an exhibit only to notice that the numbers on your exhibit are superimposed? I've had flawed exhibits too, only noticed in the middle of a trial even though I'd checked them a million times.

"Instead of mercilessly judging and criticizing yourself for various inadequacies or shortcomings, self-compassion means you are kind and understanding when confronted with personal failings – after all, who ever

said you were supposed to be perfect?” says Dr. Kristin Neff of the University of Texas at Austin.

We may also have to dodge accusatory arrows shot at us by our own clients when the news we deliver can make us an unwitting target of their blame, anxieties, and disappointment. By partnering with each other for compassionate accountability, lawyers and CDFAs can act as sounding boards for post-case analysis. Following an honest but mutually supportive debrief, we get back in the game and often gain insights that make us more effective on the next case. We can also help each other set and hold healthy boundaries with clients who may be excessively needy or have personality disorders.

3. We can REALLY listen to client stories.

Although I've been a student of active listening for decades, I still struggle when sitting with clients. Lawyers are trained to listen first for issues, targets of blame that we can sue, elements of a legal action, and credibility of our client's story. Often we're taking lengthy notes and barely making eye contact. With such a hefty agenda it is impossible to listen deeply with an open heart to what the client is saying. We must make good listening a mindful first priority.

Since CDFAs hear the client's story from a different vantage point, both professionals can compare notes on what we've heard. Because of our different, yet complementary goals with clients, we can fine tune the details and consolidate information to help us craft settlements. Having two companion but uniquely trained professionals working together brings satisfaction to the client, much like having two specialist doctors comparing notes before surgery. Looking for opportunities to compare notes on the stories helps us both more fully understand client's needs.

4. We can become problem solvers.

Clients are anxious to save fees, but through cross referral between the lawyer and CDFA, clients get deep expertise in a streamlined fashion. CDFAs can triage the financial hot buttons, and lawyers can spend time focusing on legal drafting and court approval. Each professional does what we do best and we can meet with the clients at a pace that works for them, then comparing our impressions and ideas. As collaborative problem solvers we can come up with uniquely customized results.

The road isn't always smooth. In my very first collaboration with Cindy, when the client realized she had to “wake up” to money issues and was facing divorce she checked herself into the psych ward of a local hospital after our first joint meeting.

These types of clients can drain us on our own, but as a team we were able to manage her with deep compassion without becoming frustrated. We developed customized plans for her to navigate the stressors that considered her emotional frailty.

5. We can demonstrate an important leadership quality: humility.

It's easy to think that as a person with a law degree and years of experience, “I know it all” about how to structure settlements. By accepting that I still have things to learn, I found the benefit of teaming up with someone who stays abreast of cutting-edge financial concepts and ever-changing IRS regulations. Accepting the CDFA expertise has humbled me and made me a better lawyer and leader in my legal community.

Likewise, lawyers can educate CDFAs about our world. Things that pass muster with the IRS might not pass muster with the judge. Selling cutting-edge financial outcomes requires patience and our personal experience in getting things done in the courtroom. By listening to our point of view and letting us navigate our familiar turf, we are more likely to get the judge's signature on our creative documents.

Does a lawyer/CDFA collaboration sound appealing? If so, it's easy to get the dialogue started. You can volunteer to speak at bar meetings, collaborative practice group meetings, and in-house at law firms. Lawyers are always looking for new ideas and knowledge, especially those lawyers who are early- to mid-career.

In my case it was simple. A bright and ambitious CDFA took me to lunch. And as a result lives have been changed, including my own.

About the Author



Kimberly Stamatelos is an attorney, author, and mediator in West Des Moines, Iowa. She can be reached at 515-223-1631 or kim@thecompassionatealliance.com.

The CDFA she regularly collaborates with, Cindy Gleason, can be reached at cindy@gleasonresourcegroup.com.