



COLLABORATIVE DIVORCE

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GENERAL PROCESS

- ❖ Initial Consultations
- ❖ Attorney Pre-Brief Meeting & Agenda Prep
- ❖ First Joint Meeting
- ❖ Professional Team Post-Brief Meeting
- ❖ Individual Meetings Between Clients & Professionals
- ❖ Professional Team Pre-Brief Meeting
- ❖ Second Joint Meeting
- ❖ Professional Team Post-Brief Meeting
- ❖ Additional Meetings as Needed to Case Conclusion

INITIAL CONSULTS WITH ATTORNEYS

- ❖ Discuss option available for resolving dissolution of marriage issues
 - ❖ Negotiation
 - ❖ Litigation
 - ❖ Arbitration
 - ❖ Mediation
 - ❖ Collaborative
 - ❖ Including requirement of Participation Agreement and role of professional team members

ATTORNEY PRE-BRIEF & AGENDA PREP

- ❖ Discussion regarding potential need for additional professional team members and presentation of such information to parties
 - ❖ Financial Neutral
 - ❖ Mental Health Professional(s)
 - ❖ Mediator
 - ❖ Vocational Rehab Specialist
 - ❖ Appraiser
 - ❖ Other

FIRST JOINT MEETING

- ❖ Discuss & identify other team members needed
 - ❖ Financial Neutral considerations:
 - ❖ Education
 - ❖ Training
 - ❖ Experience / Referrals
 - ❖ Process ' Tools
 - ❖ Costs
 - ❖ E&O Insurance
 - ❖ Establish plan for promptly notifying & retaining new team members such as Financial Neutral
- ❖ Meeting notes to be provided to all team members

PRO TEAM POST-BRIEF

- ❖ Include add'l team members agreed upon by parties during joint meeting
- ❖ Discussion as to:
 - ❖ Expectations for role & duties of pro team member
 - ❖ Preferred form of communications between various team members & parties individually or jointly
- ❖ Establish deadlines by which info/docs will be shared w/other pro team members prior to next joint meeting w/parties
- ❖ Establish which meetings pro team member(s) will attend & schedule
- ❖ Meeting notes to be provided to all team members

INDIVIDUAL PRO MEETINGS W/PARTIES

- ❖ Financial Neutral Meeting(s) w/Parties
 - ❖ Individually or jointly per pro team agreed upon preference
 - ❖ Review & execute fee agreement
 - ❖ Prepare ' fine tune individual budgets
 - ❖ Discuss income & expenses
 - ❖ Attorneys should notify FN of each party's level of assistance needed in preparing individual budgets
 - ❖ Gather info/docs in relation to assets & liabilities
 - ❖ Assess need for appraisals, vocational rehab, etc.
 - ❖ Discuss concepts such as "Loss Aversion"
 - ❖ Communicate w/other team members if needed

PRO TEAM PRE-BRIEF

- ❖ Attorneys, Financial Neutral & Mental Health Pros reconvene to prepare for second joint meeting w/parties
- ❖ Confirm which professional(s) will attend joint meeting & for what purpose
- ❖ Identify how each professional will participate in joint meeting:
 - ❖ Is there a reason for a particular pro to run the meeting?
 - ❖ MHP – child custody issues
 - ❖ Financial Neutral – financial issues
 - ❖ Attorneys – legal issues
- ❖ Meeting notes to be promptly provided to all team members

SECOND JOINT MEETING

- ❖ Work through Agenda previously established by parties & professionals
 - ❖ Children's Issues
 - ❖ Division of Assets & Liabilities
 - ❖ Alimony / Spousal Support
- ❖ Identify next steps in process & potential agenda for next joint meeting
 - ❖ Next meeting date, time & location
 - ❖ Tasks to be completed by each team member before next meeting
- ❖ Meeting notes to be promptly provided to all team members
- ❖ Continue process of pre-briefs, meetings & post-briefs as needed to case conclusion
 - ❖ Attorneys should notify FN of docs needed for court filings

ADDITIONAL NOTES FOR FINANCIAL NEUTRALS

- ❖ Attorneys should notify Financial Neutral of parties' desire to have FN joint collaborative team as early as possible in case
- ❖ Letter of Engagement
- ❖ Regular, continuing communications must be had between attorneys & FN w/respect to FN's case involvement:
 - ❖ Handling of FN costs
 - ❖ Calendar meeting dates, times, locations
 - ❖ Meetings FN is expected to attend
 - ❖ Nature & scope of work expected of FN
 - ❖ Preferred method of communication w/parties
 - ❖ Level of assistance needed in preparing budgets
 - ❖ Deadlines
 - ❖ Exchange of info/documentation
- ❖ Meeting notes w/any relevance to financials must always be promptly provided to FN