



FLOW CHART FOR COLLABORATIVE DIVORCE

Client Walks Into Attorney's Office

Initial Client/Attorney Consultation

Establish rapport with client
Identify goals and interests
Screen for Domestic Violence Issues (UCLA Section 15)
Determine appropriateness for Collaborative Process

Informed Consent

Reconciliation
Therapy
Litigation
Meditation - Pre-Suit/ Post Filing
Post Nuptial Agreement
Direct Negotiation
Collaborative Process
Participation Agreement
(Goals, Interests, Needs)
Interest Based Negotiation
Team Approach
Roles of MHP and FP
Expectations of Conduct

Sign Retainer Agreement

If Spouse has Collaborative Counsel Call
Counsel

If Spouse does not have Counsel
Send letter to spouse with Referral
to Practice Group Website

Parties Retain Collaborative Attorneys

Parties Retain Collaborative Attorneys
Attorneys assemble Team of Neutral MHP and FP
Advise Clients to meet with MHP and FP

Professional Team Planning Meeting

How the team will handle/ resolve intra-team conflicts
Role, expectations and experience of each team member

How professional fee disparities will be handled
How pre-team meetings will be conducted
How team meetings will be conducted
Planning the Agenda
Recording the minutes - When will the clients receive the minutes?
Will a Scribe be used?
How emails will be handled. Will clients be copied? When?
How information sharing will be conducted
How Debriefings will be conducted
How each professional would like to receive feedback?
Where, when, and how each team member prefers to receive feedback

Clients Meet with MHP

MHP Interview

MHP Teleconference with Attorneys, FP

Immediate Issues
Clients' Goals, Interests and Needs
Discuss and Prepare Agenda for First Team Meeting

Pre-Conference Meeting Attorney/Client

Review Participation Agreement
Review Agenda
Expectations of Conduct
Goals, Interests and Needs

First Team Meeting – 2 hours (Clients/ Attorneys/ MHP and FP)

Welcome and Introduction by MHP
Designate Secretary for Memo/Minutes
Review of Participation Agreement and Declaration of Principles
Entertain any questions from clients
Execution of Participation Agreement
Date of Filing
Discuss immediate needs, concerns, goals
Discuss long term needs, concerns, goals
Financial Professional
List of documents that need to be exchanged
Financial Affidavits
Parenting Plan
Schedule date for next 2 meetings

Debrief with Professionals
Debrief Attorney with Client

Clients Meet With MHP

Child Issues
Parenting Plan*

Clients Meet with Financial Professional

MHP Teleconference with Team

Discussion of Agenda for Second Team Meeting
Discuss financial and family issues

Pre- Conference Meeting Attorney/Client for Second Meeting

Review Agenda

Second Team Meeting– 2 hours (Clients/ Attorneys/ MHP and FP)

Designate person to take Minutes
Approve Minutes - 1st Team Meeting
Sign Partial Agreements
Financial Professional conducts discussion of parties' assets, liabilities, income and expenses
Discussion of valuation methods, sources of income, need for appraisals
Explanation of income for support purposes
Preliminary Financial Options Presented*

Debrief Attorney with Client

Debrief Meeting with Team

Attorney and Client meet separately with FP

Discuss assets division with each client
Discuss support options
FP Teleconference with Team
Preliminary financial options presented*
Discuss any missing documents or information

MHP Teleconference with Team

Parenting Plan/Time Issues*

Pre-Conference Meeting Attorney/Client

Review Agenda
Review Parenting Plan

Third Team Meeting

Designate person to take Minute
Approve Minutes – 2nd Team Meeting
Sign Partial Agreements
Discussion of financial options
Reviewing goals, interests and needs
Brainstorming
Inventing options for mutual gain
Generating choices
Reaching agreement
Memorializing the agreement

Debrief Attorney with Client
Debrief Meeting with Team

FP performs additional investigation
FP prepares additional financial schedules*
for discussion at final Team Meeting

MHP finalizes Parenting Plan
and time-sharing schedules*

Attorneys Draft Marital Settlement Agreement

Proposed Agreement is circulated between clients and Team for review, corrections and approval

Final Team Meeting

Professionals express appreciation to clients for their efforts
Execute Collaborative Marital Settlement Agreement

The IACP Survey

* Indicates ongoing meetings

