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
Litigation
Meditation - Pre Suit or Post Filing
Soft Negotiation
Collaborative Divorce
Participation Agreement
Interest Based Negotiation (Goals, Interests, Needs)
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

Collaborative Process Begins
Attorneys connect each other to discuss issues
Assemble Team – MHP and (if needed) FP
Advise Clients to meet with MHP

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Clients Meet with MHP
MHP Interview
Parenting Plan Questionnaire

MHP Teleconference with Attorneys
Immediate Issues
Clients’ Goals, Interests and Needs
Discuss and Prepare Agenda for First Team Meeting

Pre-Conference Meeting Attorney/Client/MHP
Review Agenda
Goals, Interests and Needs

First Team Meeting – 2 hours (Clients/Attorneys/ MHP)
Introductions
Designate Minutes Secretary
Review of Collaborative Process
Review of the Participation Agreement
Sign the Participation Agreement
Expectations of Conduct
Immediate concerns
Identify goals, needs and interests
Child Issues
Date of Filing
Financial Neutral
Provide Mandatory Disclosure List
Schedule dates for next 2 meetings

Debrief Meeting with Client

Debrief Meeting with Team

Clients Meet with MHP
Child Issues
Parenting Plan*

MHP Teleconference with Team
Discussion of Agenda for Second Team Meeting

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Pre-Conference Meeting Attorney/Client/MHP for Second Meeting
Review Agenda

Second Team Meeting

Minutes
Introduction of Financial Professional
FP’s Scope of Work and Fee Schedule
FP executes Participation Agreement
Clients sign Engagement letter with Financial Professional
Parties identify assets, liabilities and income
Designation of provider of records
Discussion of valuation methods, sources of income, need for appraisals
Explanation of income for support purposes
Provide Financial Professional with Clients’ Mandatory Disclosure
Preparation of Minutes

Debriefings

Attorney and Client meet separately with FP/MHP
Discusses assets division with each client
Discusses support options

FP Teleconference with Team
Preliminary Financial Options Presented*

MHP Teleconference with Team
Parenting Plan/Time Issues*

Pre-Conference Meeting Attorney/Client/MHP
Review Agenda

Third Team Meeting

Minutes
Discussion of financial schedules
Reviewing goals, interests and needs
Brainstorming
Inventing options for mutual gain
Generating choices
Reaching agreement
Memorializing the agreement

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Debriefings

FP performs additional investigation
needed as a result of negotiations and
time sharing schedules*

FP prepares additional financial schedules*
for discussion at next Team Meeting

MHP finalizes Parenting Plan

Attorneys Draft 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

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