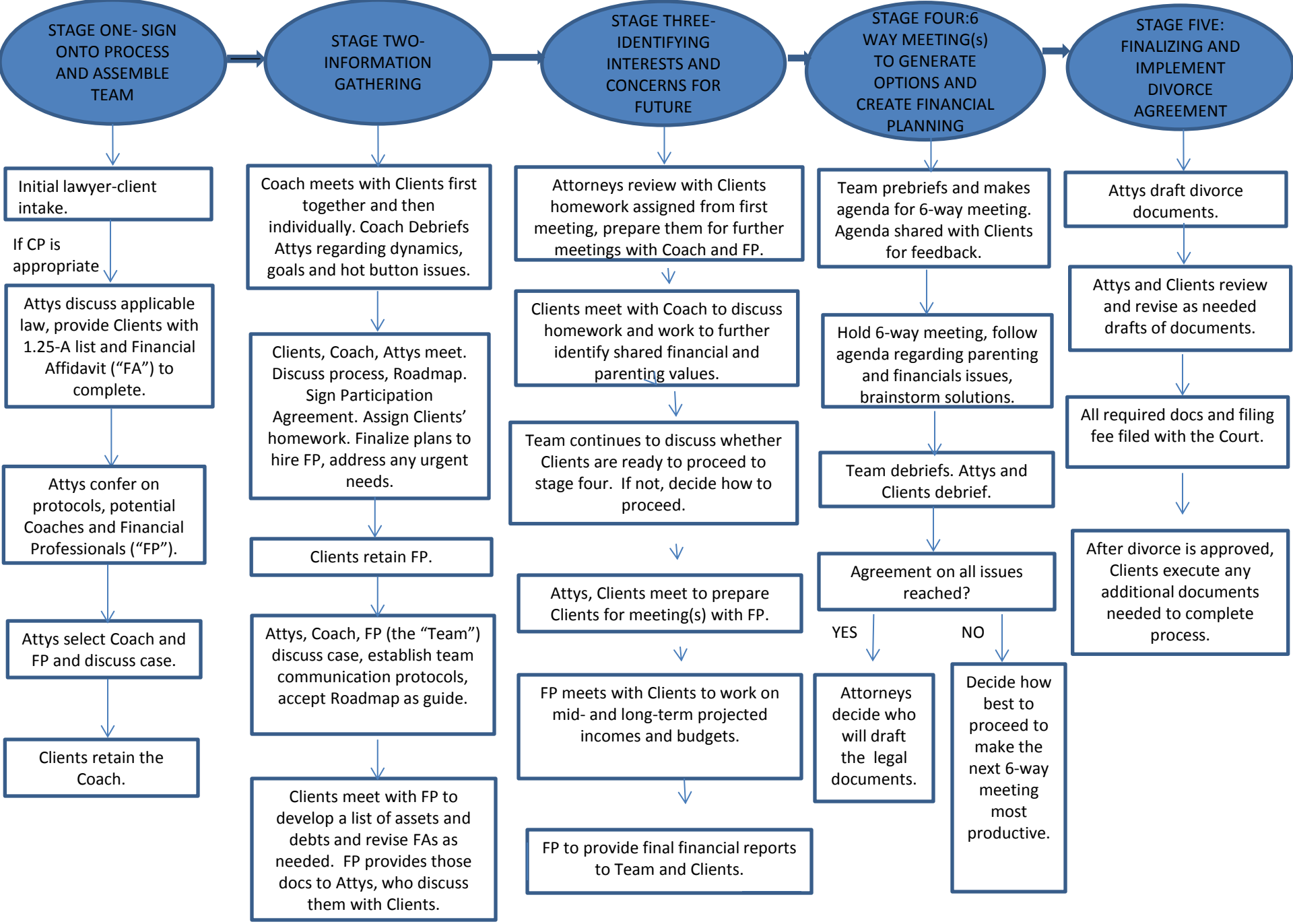
STAGE ONE- SIGN ONTO PROCESS AND ASSEMBLE TEAM
Initial lawyer-client intake.
If CP is appropriate
Attys discuss applicable law, provide Clients with 1.25-A list and Financial Affidavit ("FA") to complete.
Attys confer on protocols, potential Coaches and Financial Professionals ("FP").
Attys select Coach and FP and discuss case.
Clients retain the Coach.
STAGE TWO- INFORMATION GATHERING
Coach meets with Clients first together and then individually. Coach Debriefs Attys regarding dynamics, goals and hot button issues.
Clients, Coach, Attys meet. Discuss process, Roadmap. Sign Participation Agreement. Assign Clients' homework. Finalize plans to hire FP, address any urgent needs.
Clients retain FP.
Attys, Coach, FP (the "Team") discuss case, establish team communication protocols, accept Roadmap as guide.
Clients meet with FP to develop a list of assets and debts and revise FAs as needed. FP provides those docs to Attys, who discuss them with Clients.
STAGE THREE- IDENTIFYING INTERESTS AND CONCERNS FOR FUTURE
Attorneys review with Clients homework assigned from first meeting, prepare them for further meetings with Coach and FP.
Clients meet with Coach to discuss homework and work to further identify shared financial and parenting values.
Team continues to discuss whether Clients are ready to proceed to stage four. If not, decide how to proceed.
Attys, Clients meet to prepare Clients for meeting(s) with FP.
FP meets with Clients to work on mid- and long-term projected incomes and budgets.
FP to provide final financial reports to Team and Clients.
STAGE FOUR:6 WAY MEETING(s) TO GENERATE OPTIONS AND CREATE FINANCIAL PLANNING
Team prebriefs and makes agenda for 6-way meeting. Agenda shared with Clients for feedback.
Hold 6-way meeting, follow agenda regarding parenting and financials issues, brainstorm solutions.
Team debriefs. Attys and Clients debrief.
Agreement on all issues reached?
YES
NO
Attorneys decide who will draft the legal documents.
Decide how best to proceed to make the next 6-way meeting most productive.
STAGE FIVE: FINALIZING AND IMPLEMENT DIVORCE AGREEMENT
Attys draft divorce documents.
Attys and Clients review and revise as needed drafts of documents.
All required docs and filing fee filed with the Court.
After divorce is approved, Clients execute any additional documents needed to complete process.