

Below is a compilation of suggestions on how each profession can help the other professions in a collaborative divorce.

ATTORNEYS:

What Attorneys Want from Financial Neutrals:

1. Inform the hosting attorney of the financial neutral's equipment set up needs in advance of the meeting
2. Arrive early to get equipment set up
3. Gather all of the necessary financial information
4. Streamline the collection of data
5. Share data with team professionals and parties using an online resource (like Share File)
6. Discuss the reports needed by the team professionals in advance of distributing reports
7. Report to the team professionals if there is a disagreement as to asset values
8. Ask the parties and set the valuation date to be used
9. Work on budgets with both parties
10. Bring creative ideas and options
11. Prepare final property report and budgets to be able to attach them to the Financial Affidavit

What Attorneys want from Coach/Facilitators:

1. Keep a read on the room and the team and call for a break when needed
2. Don't be afraid to lead us! We want you and trust you to facilitate our process
3. Be a 'Case Manager' – i.e.: keep us on task with deadlines; manage our pace
4. Provide honest feedback to the team
5. Ensure that we use the Best Practices of Process

6. Create an agenda for each meeting
7. Alternate first draft of meeting minutes between the attorneys then review by the Professional Team before circulating to couple (by Divorce Coach)
8. Make sure the team has pre-briefs and post-briefs – every case
9. Coordinate a case wrap up at conclusion of case
10. Survey clients?
11. Summarize Mental health and substance abuse issues for the Professional Team
12. Advise the Professional Team on how to navigate hot-button issues
13. Advise the clients how to care for themselves; maintain safety of the forum

What Financial Neutrals Want from Attorneys:

1. Clients need better education from attorneys on their responsibility to collaborate and be more active participants.
2. Involve the Financial Neutral from the beginning, including the meeting where the Participation Agreement is signed.
3. Attorneys should review all financial information before us. (Note: Some attorneys have indicated that they would like the Financial Neutral to review the information first. This task should be discussed and clearly agreed upon before any documentation is gathered, to reduce duplication of effort and time billed.)
4. Set realistic expectations in the framework of the law (e.g. how long alimony may be awarded for).

What Financial Neutrals Want From Coach/Facilitators:

1. “Heads up” on emotional issues and tendencies before our first financial meeting with the couple.
2. Watch us as much as you watch the clients, and give us help with communication skills.
3. Workshops for Financial Neutrals on different personality types
4. Tell us the best way to deliver “bad news” to the type of client we are working with.

What Coach/Facilitators want from Attorneys:

1. Clarify working style and expectations – be open to communication about process before case begins.
2. Be receptive/open to feedback. Give us feedback.
3. Watch “positional” language.
4. Respond to emails in a timely manner.
5. Respond to scheduling requests promptly.
6. Respect Coaches role as Facilitator of process.
7. Don’t avoid de-briefs.
8. “Have my back” outside of the group meetings with your client.

What Coach/Facilitators want from Financial Neutrals:

1. Be open to communication prior to the Financial Neutrals meeting with clients together
2. We encourage the Financial Neutral to call the Coach for couple dynamics
3. Please keep us CC’d on all correspondence so as Facilitators we know the financial information is happening.