

ROADMAP OF THE COLLABORATIVE DIVORCE PROCESS: Neutral Coach Model

Both of you want to be treated fairly. “Fair” is a very subjective idea; however, careful preparation and good communication can facilitate and perhaps shorten the process and help us achieve an outcome that is satisfactory to both parties. We have developed the Roadmap to assist you in understanding the process and to know where you are in the process at any given time.

The precise course of your particular case will vary depending upon several factors, including your individual needs, the complexity of the finances, whether you have children and if so, the needs of your children.

Alert:

1. Completing your assignments in a timely manner **will save you time and money.**
 2. Following the Roadmap **will save you additional time and money.**
 3. Using the coach to assist you **will save you additional time and money.**
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Stage One: Signing on to the Process and Assembling the Team

- ___ 1.1 Clients meet and hire attorneys. Attorneys advised to use a screening process, including possibly sending clients to meet with coach to discuss the process.
- ___ 1.2 Attorneys confer regarding assembling the team.
- ___ 1.2a Attorneys confer regarding Roadmap, Release and Collaborative Agreement when working with attorneys outside of NJCLG.
- ___ 1.3 Attorneys select the coach prior to or during the first meeting.
- ___ 1.4 Attorneys and coach discuss the case and decide upon Agenda before first meeting.
- ___ 1.5 Professionals conference to debrief case prior to first 4 or 5-way (including coach) 10-15 minutes before session begins.
- ___ 1.6 First 4 or 5-way meeting at which: (*Meeting should last 1.5-2 hours max.*)
 - ___ Coach attends first meeting and is hired by clients;
 - ___ Introductions and brief general discussion of client goals (long term and expectations of process). Specific discussion of interests and goals

Reserved for **Stage 3**.

- ___ Rules of Civility reviewed;
 - ___ Participation agreement and release signed;
 - ___ Roadmap reviewed;
 - ___ Valuation date discussion;
 - ___ Cost of collaborative process and discussion of how it will be paid;
 - ___ Schedule meeting with clients and coach on Parenting issues as needed;
 - ___ Schedule first Financial meeting (financial neutral and clients only). Clients given financial forms to fill out prior to meeting with financial neutral. Attorneys advised to meet and review forms for completeness before clients meet with Financial neutral for the first time.
 - ___ Schedule Financial 6-way and other appropriate meetings, as necessary;
 - ___ Set up any temporary children/cash flow arrangements.
- ___ 1.7 Professionals debrief immediately post meeting to discuss success and approach to issues raised in meeting and develop overall timing of the case. Coach is given sample parenting plans and Holiday schedule to be used for informative purposes.
- ___ 1.8 Clients meet with financial specialist and begin financial information assembly, if necessary.

Stage Two: Communicate and Gather Information regarding Children and Finances

A better outcome is reached after you completely understand your financial situation and the best way to help your children. This stage involves the exchange of all necessary information and creates a good foundation for decision making.

Children and Communications

- ___ 2.1 The Divorce Coach meets with clients together and individually. Jointly you determine whether to use a child specialist or have the coach handle this work. Child specialist selected, if indicated, and meets with parents. (If one party wants specialist, then one is usually chosen.)
- ___ 2.2 Coach has regular check-in with clients and meets with them as needed to stay centered and develop a sense of priorities.

- ___ 2.3 Coach provides resources to clients on how to manage emotions of going through divorce and educates clients on the needs of their children.
- ___ 2.4 Coach meets with clients together, as needed, to develop parenting plan and facilitate communication. These will be ongoing sessions throughout the process. Final plans are agreed upon at 5-way and attorneys draw up parenting plan to be executed which will be binding. (This is helpful if difficulties arise regarding other issues.)
- ___ 2.5 Child specialist meets with children if indicated.

Finances

- ___ 2a.1 Clients jointly provide all necessary financial information.
- ___ 2a.2 Clients jointly have two or three meetings with financial specialist.*
- ___ 2a.3 Financial 6-way: attorneys, clients, coach and financial specialist meet for Presentation of financial picture and determination of what additional appraisal or assessment work is necessary.
- ___ 2a.4 Additional appraisals or assessment work undertaken and completed; assemble all financial information for a complete financial picture.
- ___ 2a.5 Second financial 6-way, if needed.
- ___ 2a.6 Professional conference call to decide who should be present at which meetings during Stage 3 and discuss any issues that have developed.

*A financial neutral may be involved in each case with other financial specialists included, as needed, on a case by case basis. (Use of a software program that includes an inflation calculator to calculate the impact of taxes and future income/expenses is encouraged.)

Stage Three: Identifying Interests and Concerns

Both of you want an outcome that meets your most important concerns; in this stage, we take the time to explore your values, your concerns and your priorities, so that we will be better able to find a mutually acceptable resolution. Instead of getting locked into positions, we need to develop possibilities, to help us find the common ground to reach resolution.

- ___ 3.1 *Five way Preparation:* Clients will meet in a 5-way with their attorneys and the coach to identify clients' interests and priorities.
- ___ 3.2/3.3 *Interest Meeting:* Clients will meet in a 6-way with attorneys, coach and financial specialist to discuss and understand each other's individual interests and

priorities; group brainstorming regarding possible solutions. Clients meet separately and/or together with appropriate professional team members to review the possible solutions that were developed during brainstorming, to develop options for consideration and review implications of different possibilities. Repeat this step as many times as necessary. (Note: this is a critical step and is intentionally positioned *after* the exchange of financial information so that clients are well-informed when they state their goals.)

- ___ 3.4 Clients meet jointly in a 4-way meeting with the child specialist (if one is being used) and the coach for feedback from the child specialist.
- ___ 3.5 Professionals conference call to discuss financial and parenting decision making process, including who should be present and responsible for leading each effort.

Assess whether the process is ready to move to Stage 4.

Stage Four: Making Decisions

Having done all homework well, clients are now ready to reach conclusions that meet the needs of both of them (and their children). To do this, we need to have an orderly exchange of ideas and proposals and continue the conversation until, working as a team, a result is found that both clients can accept.

- ___ 4.1 Clients meet jointly in a 3, 4, 5 or 6-way meeting with attorneys and other professionals as appropriate and necessary to present several financial packages, identifying the interests served for each person by each of the possible solutions.
- ___ 4.1a Rules of Civility reviewed.
- ___ 4.2 Clients have settlement meetings as needed with professionals to come to a conclusion regarding the financial plan.
- ___ 4.3 Clients meet with the coach (or as otherwise arranged) to develop the parenting plan. Coach may be provided with sample parenting plan and holiday schedule to be used for informative purposes.
- ___ 4.4 Clients meet jointly with the lawyers/team to finalize any open issues, and take any step necessary for implementing the agreement (for example, arrange for refinancing or marketing the house, discuss stock transfers, decide how you are going to do the pension transfers, if necessary, etc., as applicable).
- ___ 4.4a Professional team reviews open issues before meeting with clients.
- ___ 4.5 Professional conference call: Inform all team members of outcome and identify recommendations for couple for future. Team debriefing.

Stage Five: Finalizing and Implementing the Plan

To complete the process, make decisions about timing and the implantation of the agreement. In order to complete our work, appropriate documents need to be signed by both parties.

- ___ 5.1 Clients jointly agree which attorney will draw up the agreement and whether to divorce immediately or wait; paperwork is drawn up by attorneys.

- ___ 5.2 Clients jointly meet with the attorneys to revise and sign Marital Settlement Agreement and any ancillary paperwork (deed, titles, etc.) and discuss any recommendations from the team. All professionals should be paid in full before the signing occurs.

- ___ 5.3 Divorce paperwork and pension paperwork completed.