

ROADMAP OF THE COLLABORATIVE DIVORCE PROCESS: Two 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 where you are 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.

WARNINGS

1. Failure to do your assignments in a timely way will cost additional time and money.
2. Deviating from the Roadmap may cost additional time and money.
3. Failure to use your Coach to assist you in managing your emotions will cost additional time and money.

Stage One: Signing on to the Process and Assembling the Team

- ___ 1.1 Clients meet and hire Attorneys.
 - ___ P.1 *Attorneys confer regarding assembling the team, decide on the number of Coaches, recommend Coaches and Financial Neutral, if appropriate. Attorneys review and edit the roadmap accordingly.*
- ___ 1.2 Clients interview, select and retain Coaches and Financial Neutral.
- ___ 1.3 Clients meet with Coaches.
 - ___ P.2 *Professionals confer to decide who will attend the first team meeting and to create the agenda.*
- ___ 1.4 Attorneys/Coaches touch base with Clients prior to meeting and advise other team members of any pressing issues, prepare Clients to identify goals and questions to be answered for the first meeting.

Stage Two: First Team Meeting

- ___ 2.1 First Team meeting at which:
 - ___ Participation agreement and release signed;
 - ___ Roadmap reviewed;
 - ___ Address pressing issues including setting up any temporary arrangements regarding cash flow and/or child related issues;
 - ___ Identify goals;
 - ___ Identify questions to be answered;
 - ___ Identify information to be gathered;
 - ___ Set the next two meetings;
 - ___ Assign homework.

- ___ P.3 *Professionals debrief. Distribute minutes.*

Stage Three: 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

- ___ 3.1 Clients meet with Coaches and determine whether to use a Child Specialist. Child Specialist selected, if indicated, and meets with Clients.

- ___ 3.2 Coaches have regular check-in with Clients and meet with Clients as needed.

- ___ 3.3 Child Specialist meets with the children.

- ___ 3.4 Clients and Coaches hold 4-way meetings to facilitate communication. These will be ongoing sessions throughout the process.

- ___ 3.5 Clients meet with Coaches and Child Specialist to receive feedback from Child Specialist.

Finances

- ___ 3a.1 Clients disclose and provide all necessary financial documentation to the Financial Neutral.

- ___ 3a.2 Clients meet with Financial Neutral to gather information and develop budgets and other financial schedules.
 - ___ P.4 *Financial Neutral shares information with other professionals in anticipation of financial 5-way meeting.*

___ 3a.3 Financial Meeting: Attorneys, Clients, (Coaches if needed) and Financial Neutral meet for presentation of financial picture and determination of what additional work/information is necessary.

___ P.5 *Professionals debrief. Distribute minutes.*

___ 3a.4 Additional work undertaken and completed; assemble all financial information for a complete financial picture.

___ 3a.5 Additional Financial Meetings, if needed.

___ P.6 *Professionals debrief. Distribute minutes.*

___ P.7 *Professionals Conference Call to decide who should be present at which meetings during Stage Four and discuss any issues that have developed.*

Stage Four: Identifying Options and Making Decisions

Having completed all homework and information gathering, you are now ready to reach conclusions that meet the needs of you and your family. To do this, we need to have an orderly exchange of ideas and options, and continue the conversation until we find a result that both of you can accept.

Some thoughts about decision-making:

Each of you wants an outcome that meets your most important concerns; throughout the process, 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 options, to help us find the common ground to reach resolution. You will use these techniques throughout the process to come to resolution.

- A. Clients meet as appropriate in either a four-way meeting with Attorneys or Coaches, five-way meeting with the Financial Neutral and Attorneys, six-way meeting with Attorney and Coaches, or seven-way meeting with everyone to discuss and understand each other's individual interests and priorities.
- B. Brainstorming Options: In these meetings Clients brainstorm possible options for the issue at hand without evaluating the ideas.
- C. Evaluating Options: Clients review the options that were developed during brainstorming, review the implications of the different options, including sharing concerns and thoughts about the different options and, if necessary, to develop additional options.

- ___ 4.1 Clients meet jointly in a four, five or seven-way meeting with Attorneys and other professionals as appropriate and necessary to brainstorm options for all questions to be answered. There is NO evaluation of options at this stage.
___ *P.8 Professionals debrief. Distribute Minutes.*
- ___ 4.2 Clients have meetings as needed with professionals to brainstorm, evaluate options, come to conclusions regarding the financial plan.
___ *P.9 Professionals debrief. Distribute Minutes.*
- ___ 4.3 Clients meet with Coaches to develop the parenting plan by brainstorming options and evaluating them, identifying the interests served for each person by each of the possible options.
___ *P.10 Professionals debrief. Distribute Minutes.*
- ___ 4.4 Clients meet jointly with Attorneys to finalize any open issues, to review the questions to be answered to make sure all questions have been answered, and to identify any steps necessary for implementing the agreement.
___ *P.11 Professionals debrief.*
- ___ 4.5 Clients may also agree on follow up with Coaches/Child Specialist regarding future issues related to the children.

Stage Five: Finalizing and Implementing the Plan

To complete the process, decisions may need to be made about timing and the implementation 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 draft the agreement and whether to divorce immediately or wait. If a divorce proceeding is imminent, decide who will be initiating the proceedings.
___ *P.12 Property settlement/separation agreement and related documents are drawn up and reviewed by the Attorneys.*
- ___ 5.2 Clients meet with their respective Attorneys to revise and sign property settlement/separation agreement and any related documents (deed, titles, etc) and discuss any recommendations from the team. All professionals should be paid in full before the signing occurs.
- ___ 5.3 Divorce pleadings and retirement paperwork completed.
___ *P.13 Attorneys file for uncontested divorce.*
- ___ 5.4 Clients attend an uncontested divorce proceeding to finalize their divorce.
___ *P.14 Professionals debrief.*