

COLLABORATIVE Practice Tips

A monthly bulletin from the CP Cal Practice Excellence Committee

The Practice Excellence Committee is pleased to offer tips to help you increase your Collaborative cases and achieve *practice excellence*.



Please send us your comments and questions! Email us at info@cpca.com

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Best Practices for Working with a Neutral Financial Professional (NFP)

Tip #1

Clearly explain to the prospective client the benefits that working with an NFP can bring to the process and to their personal situation. Since most clients will have financial professionals with whom they work on an ongoing basis, stress the need for someone who is trained in the intricacies of the financial aspects of divorce and able to be, and be perceived, as neutral.

Tip #2

Engage the NFP at the start of the Collaborative process. Bringing in the financial professional in the middle of the case because the financial complexities were underestimated at the outset will create additional expense and run the risk that the clients will never perceive the NFP as a full team member. The NFPs help clients collect and organize financial data and keep track of homework that needs to be done prior to the next meeting.

Tip #3

Agree at the outset what exactly each professional will be responsible for. For example, who will be the team manager, responsible for scheduling, etc.? Should the financial information come through the lawyer's office or be provided directly to the NFP? Who will be responsible for completing the DoD's? Are there any meetings that the other professionals want to join when the NFP meets with the client?

Tip #4

Define the roles in team meetings. Should the financial professional be responsible for facilitating the meetings? Should financial programs such as Dissomaster be run at all or

"on-the-fly" in team meetings?

Tip #5

Support the role of the NFP. Since a common refrain in Collaborative cases is often "do we really need to employ all these people?" it is important that all team members on the case are consistent in supporting the model and the roles that each of the three professions play. The NFP provides a straight forward and neutral role in facilitating team meetings and presenting facts in formats that help clients understand their financial circumstances. The NFP can also run valuable financial scenarios to help clients see their options for dividing assets, as well as projections of how the money will last. These tools guide clients in understanding their financial picture and lead them towards acceptable agreements.

Attend CP Cal Collaborative Conference 12! WE AGREE! Harnessing the Energy of Collaborative Practice



Don't miss this year's conference in Redondo Beach! With two pre-conference institutes, three plenary sessions, and 21 workshops to choose from, there is something for everyone. Check your mail box for your Conference brochure and watch for more information via email!

Or visit the website: CPCal.org

Two-day training in advance of the conference. CP Cal is also partnering with the Sacramento Collaborative Practice Group in offering a two-day training in advance of the Conference (Thursday-Friday, April 27-28). Discounts are available for conference attendees. For more information and to register, contact LindieSCPG@divorceoption.com or call 916-455-5200.

Upcoming Northern California Mediation Training. Presented by Catherine Conner and Gary Friedman. Working Creatively with Conflict: 40 Hour Basic Mediation and Conflict Resolution Training. **At Green Gulch in Muir Beach: March 1-5, 2017.** For more information visit the website: understandinginconflict.org



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