

## 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.

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

- \_\_\_ 1.1 Clients meet and hire attorneys.
- \_\_\_ 1.2 Attorneys confer regarding assembling the team, recommend coaches
- \_\_\_ 1.3 Clients interview and select coaches
- \_\_\_ 1.4 First four way meeting at which:
  - \_\_\_ participation agreement and release signed;
  - \_\_\_ roadmap reviewed;
  - \_\_\_ valuation date discussion;
  - \_\_\_ cost of collaborative and discussion of how it will be paid;
  - \_\_\_ schedule first Financial meeting;
  - \_\_\_ schedule Financial 5 way and other appropriate meetings;
  - \_\_\_ set up any temporary children/cash flow arrangements.
- \_\_\_ 1.5 Clients meet with Financial Specialist and begin financial information assembly.
- \_\_\_ 1.6 Professionals Conference Call to assess case and develop overall timing of the case.

## **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 Coaches meet with you individually and determine whether to use a Child Specialist or have the coaches handle this work. Child Specialist selected, if indicated, and meets with parents.

\_\_\_ 2.2 Coaches have regular check-in with you and meet with you as needed to stay centered and develop a sense of priorities.

\_\_\_ 2.3 Coaches four ways, as indicated, to develop parenting plan and facilitate communication. These will be ongoing sessions throughout the process.

\_\_\_ 2.4 Child Specialist meets with your children.

### **Finances**

\_\_\_ 2a.1 You jointly provide all necessary financial information

\_\_\_ 2a.2 You jointly have two or three meetings with Financial Specialist

\_\_\_ 2a.3 Financial Five Way: attorneys, clients 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 Five 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.

### **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 *Three Way Preparation:* You will meet in a three way with your attorney and coach to identify your interests and priorities.

\_\_\_ 3.2 *Interest Meeting:* You will meet as appropriate in either a four way with attorneys, five way (financial specialist), six-way (coaches), or seven-way (coaches and financial specialist) to discuss and understand each others individual interests and priorities.

\_\_\_ 3.3 *Brainstorming Session:* group brainstorming regarding possible solutions. If possible, develop a "frame" as to what an ideal solution would have to do to achieve both parties' highest priorities.

\_\_\_ 3.4 *Development of Alternatives:* You 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.

\_\_\_ 3.5 *Child Needs Feedback:* You meet jointly in a five way meeting with the child specialist and your coaches for a feedback from the child specialist.

\_\_\_ 3.6 *Professionals Conference Call* to discuss financial and parenting decision making process, including who should be present and responsible for leading each effort.

#### **Stage Four: Making Decisions**

Having done all our homework well, we are now ready to reach conclusions that meet the needs of both of you (and your children). To do this, we need to have an orderly exchange of ideas and proposals, and continue the conversation until we find a result that both of you can accept.

\_\_\_ 4.1 You meet jointly in a 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.

\_\_\_ 4.2 You have settlement meetings as needed with professionals to come to a conclusion regarding the financial plan.

\_\_\_ 4.3 You meet with your coaches (or as otherwise arranged) to develop the parenting plan.

\_\_\_ 4.4 You meet jointly with the lawyers to finalize any open issues, and take any steps 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). You may also agree on follow up with coaches/child specialist regarding the children in the future.

\_\_\_ 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, 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 You jointly agree which attorney will draw up the agreement and whether to divorce immediately or wait; paperwork is drawn up by attorneys.

\_\_\_ 5.2 You jointly meet with the attorneys to revise and sign property settlement/separation 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.