

“TRADITIONAL” FULL TEAM

- Divorce treated as “normal” transitional event
- Review Collaborative Commitment Agreement docs at CCA meeting
- Clients no written “to-do” list for each phase/professional
- Financial Specialist Docs gathered AFTER CCA meeting
- Cost Deflators at best discussed minimally
- Case Manager = ANY Collab. Professional
- Stipulation & Order prepared AFTER CCA meeting
- Parenting plan (lawyers finalize) to sign w/ final docs
- Child Specialist attends ALL Full Team meetings
- Child Specialist preps written minutes of Feedback meeting
- Financial Specialist preps draft report AFTER meeting(s) w/ both clients
- Budget/Related Expenses discussed at Full Team meetings
- Coaches & Child Specialist allow Clients extended processing time
- No Limit on # of Coaching Meetings
- Several Full Team meetings over weeks/months

“STREAMLINED” FULL TEAM

- Divorce treated as family “life crisis”
- Review CCA docs and sign w. Client before Client-Coach-Attorney prep meeting
- Clients given comprehensive Task List by each professional before/after CCA meeting
- ALL Financial Docs, Forms, Handouts Questionnaires prep’d, reviewed, signed & shared BEFORE CCA Meeting
- Professional Team provides Cost Deflators List and focused discussion
- Case Manager = Financial Specialist (FS)
- Stipulation & Order and Guidelines prepared, reviewed, signed & shared BEFORE CCA Meeting
- Parenting Plan (lawyers finalize, respectful of client language) brought signed prior to Full Team Financial Brainwriting Meeting
- Child Specialist does NOT attend Full Team Financial Brainwriting Meetings (unless asked)
- Child Specialist does NOT prepare minutes – Provides Brief Summary Report + Remedies
- Financial Specialist directive about unrealistic budgets, discusses challenges w. clients and shares w/ team that reviews reports ahead, thus . . .
- Minimal/no discussion of Individual Budgets/Expenses at Full Team meeting
- Coaches & Child Specialist directive, w. recommendations, skills-mastery within time limits
- Coaching & Child Specialist meetings limited by time and number
- 1 Day Full Team Financial Brainwriting Meeting. AM: Allocate Assets, Debts & Income; BREAK: Clients sign any changes to Parenting Plan while Financial preps scenarios; PM: Bridge Income Gaps, Consider Trusts, Life insurance, Post-Divorce Checklist, etc.