

## COLLABORATIVE DIVORCE PROFESSIONALS, INC.

Dear \_\_\_\_\_:

I am aware that you may be interested in joining the Collaborative Divorce Professionals, Inc.; therefore, I am sending you information about our organization. Actually, the best source of information about Collaborative Family Law can be found on our Collaborative Divorce Professionals, Inc. website at [www.winwindivorce.org](http://www.winwindivorce.org).

A new member application is enclosed. You may return it with your dues check to any CDP, Inc. Board member. You will find the current roster of Board members on the website. Your application will then be forwarded to our Membership Committee for processing.

Dues are for the calendar year, while our organization's fiscal year is July 1 – June 30. New member orientation sessions are scheduled periodically, as needed. Also, our Program Committee has planned future educational programs for the monthly general membership meetings.

Our official membership roster is maintained on our website, which provides a "printable version" for use by our members and the public. There may be an additional fee, annually, to obtain a listing on our FindLaw website, which includes a free FindLaw profile as well as a link to your own website. In addition, new members will receive a packet of brochures that describe the collaborative family law process to pass out to potential clients.

All members are required to complete a standard two-day basic training course on the different concepts and skills involved in representing parties in the collaborative process. These courses are offered at various times and locations around the state and country. Sometimes one is offered in Columbus. The course is worth 12 hours of CLE, and qualifies as advanced credit for OSBA Certified Specialists in Family Relations Law. More information will be available later regarding the scheduling of training courses.

We hope that you will join us. The practice of collaborative law is very rewarding, and Collaborative Divorce Professionals is a wonderful group of attorneys and other professionals. If you have any further questions, please feel free to call or email any of our CDP, Inc. Board members.

Best regards,

CDP, Inc. Board

**Collaborative Divorce Professionals, Inc.**  
**Financial Specialist**  
(Revised 2/22/10)  
**Application for Membership**

Name: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Website: \_\_\_\_\_

Attached is a copy of Minimum Standards For Collaborative Financial Specialists Participating in Collaborative Divorce Professionals, Inc., which sets forth the background, education, experience, and training necessary and required for all Financial Specialist members. Please refer to the standards when answering the following questions and retain the standards for your records.

1. Please indicate your background. Which of the following licenses (current) or work experience applies?

- \_\_\_\_\_ Certified Financial Planner (CFP)
- \_\_\_\_\_ Certified Public Accountant (CPA)
- \_\_\_\_\_ Chartered Financial Consultant (ChFC)
- \_\_\_\_\_ minimum of 10 years of financial planning experience

2. Please indicate your training in divorce financial planning. Which of the following applies?

- \_\_\_\_\_ Certified Divorce Financial Analyst (CDFA)
- \_\_\_\_\_ Certified Financial Divorce Practitioner (CFDP)
- \_\_\_\_\_ Work experience; participation as a financial analyst in at least 20 cases, and written recommendation(s) from domestic law attorneys involved with those cases.
- \_\_\_\_\_ 20 hours completed in financial fundamentals of divorce (if not a CDFA or CFDP). Please describe course and sponsor:

\_\_\_\_\_  
\_\_\_\_\_

3. Have you completed at least 12 hours of basic interdisciplinary collaborative training or collaborative training? Yes No

If "No", are you currently registered for Basic Collaborative training and/or the Alternative Dispute Resolution training? Yes No

If "Yes", will you be able to complete this training within 12 months of acceptance as a Transitional Member? Yes No

4. Do you agree to adhere to the standards as set forth in Minimum Standards For Collaborative Financial Specialists Participating in Collaborative Divorce Professionals, Inc? Yes No

After a prompt review by the Standards Committee of the background, education, and training qualifications, you will be notified as to whether a recommendation will be made to the Membership Committee of the CDP, Inc. Once approved by the CDP, Inc. you will then again be notified as to your status, either a "Financial Specialist Member" or "Financial Specialist Transitional Member". The Standards Committee retains the right to not recommend an application for membership for any reason.

The payment of dues will be required upon acceptance as a Member or Transitional Member. In addition, non-transitional members may also pay a fee to be listed on the CDP Inc.'s FindLaw website. The current fees are as follows:

Member/Transitional Member Dues: \$200 (January- December)  
Website Dues: \$0

Payable to: Collaborative Divorce Professionals, Inc.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Recommended by (optional): \_\_\_\_\_

Please send this signed application to a current CDP, Inc. Board member

**MINIMUM STANDARDS FOR COLLABORATIVE FINANCIAL SPECIALISTS  
PARTICIPATING IN  
COLLABORATIVE DIVORCE PROFESSIONALS, INC.**  
(Revised 2/22/10)

Practice and Ethical Standards

Collaborative Divorce Professionals, Inc. (CDP, Inc.) strives to adhere to the following qualifications and standards:

A Financial Specialist qualifying as a member of the Collaborative Divorce Professionals Inc. must:

1. Be a Certified Financial Planner (CFP), Certified Public Accountant (CPA), or a Chartered Financial Consultant (ChFC) or have a minimum of 10 years of financial planning experience.
2. Have an appropriate background, education, and experience in financial planning and financial aspects of divorce including training in financial fundamentals of divorce (20 hours).
  - i. Can be fulfilled at either the Institute of Divorce Financial Analysts (Southfield, Michigan), the Academy for Financial Divorce Practitioners (DePaul, Illinois), or through selected University, Bar Association, CPA programs or other professional programs as long as continuing education credit is provided for CPAs, ChFCs, or CFPs. Evidence of course completion will be required.
  - ii. This is usually evidenced by being permitted to use the designation of Certified Divorce Financial Analyst (CDFA) or Certified Financial Divorce Practitioner (CFDP).
  - iii. Work experience may be substituted for course completion as evidenced by participation as a financial analyst in at least 20 cases, and written recommendation(s) from domestic law attorneys involved with those cases.
3. Have at least 12 hours of basic interdisciplinary collaborative training or collaborative training.
4. And, adhere to the Guideline Ethical Standards of the IACP, including:
  - a. No commissions or revenues from the sale of investments or other products to the clients involved in the collaboration,
  - b. No referral fees or other compensation for the implementation of financial strategies before or during the collaborative process.
  - c. During the process, there will be no discussion or solicitation for professional services after the inclusion of the matter.

It is noted, however, that this document addresses only on-going business standards for Collaborative Engagements. It does not apply if the Financial Specialist has not served as a Neutral in a Collaborative Engagement. If the Financial Specialist has assisted with a divorcing client in another role, but there is no Collaboration Contract with the Lawyers or Participation Agreement with the Financial Specialist, the Financial Specialist may be retained by one or both of the parties to the divorce for other business

including engaging in sales on a commission basis or accepting fees for the financial services including investment management or insurance sales.

### Collaborative Divorce Professionals, Inc. Membership Standards

To be included as a Regular Member in Forums or Group Meetings, CDP, Inc. Financial Specialists must meet the following additional requirements:

1. Pay full annual dues as set by Collaborative Divorce Professionals, Inc.
2. Devote a significant portion of their practice to Divorce Practice.
3. CDP, Inc. members are not required to be IACP members, although it is highly recommended.

### Website Inclusion

In order to maintain a listing on the Collaborative Divorce Professional, Inc. Website, Financial Specialists must submit the proper fee required as prescribed by CDP, Inc. This is in addition to their Annual Dues.

### Transitional Membership

A transitional period is allowed for interested practitioners to gain knowledge and experience in Collaborative Practice. Transitional members have 12 months to complete Collaborative Law training. Transitional members must be a CFP, CPA, or ChFC and must have completed the divorce financial training (20 hours). They must be engaged in or registered for Basic Collaborative training and/or the Alternative Dispute Resolution training. They must also adhere to the ethical standards of the IACP regarding business relationships with the collaborative clients. Transitional members will be expected to follow the standards of practice described in the CDP Participation Agreement without deviation. Transitional members may not be listed on the website.