

**CENTRAL OHIO ACADEMY OF
COLLABORATIVE DIVORCE PROFESSIONALS**

FINANCIAL PROFESSIONAL MEMBERSHIP APPLICATION

Name: _____

Firm Name (optional): _____

Address: _____

City/State: _____ Zip: _____

Phone: _____ Fax: _____

Email: _____

Personal Website: _____

Licenses/Area(s) of Specialty: _____

- I certify that I have reviewed and accepted all membership criteria contained in the Membership Standards attached hereto, and that I have completed a 14-hour introductory course in Collaborative Practice Interdisciplinary Team Training.
- I hereby certify that I have reviewed and agree to abide by and to honor the Rule for Maintaining Eligibility for Listing in Membership Roster on COACDP Website attached hereto.

Please list all Collaborative Training courses, Mediation Training courses, Financial Planning, and Financial Applications of Divorce Training programs completed:

<u>Course Name:</u>	<u>Trainer:</u>	<u>Date:</u>	<u>Hours Completed:</u>

- I have enclosed a check in the amount of \$225, made payable to Central Ohio Academy of Collaborative Divorce Professionals, as the fee for my first year of membership.

Please send your application and check to: Heather Deskins, 1900 Polaris Parkway, Suite 450, Columbus, Ohio 43240.

Date

Signature

**CENTRAL OHIO ACADEMY OF COLLABORATIVE DIVORCE PROFESSIONALS
MEMBERSHIP STANDARDS FOR COLLABORATIVE FINANCIAL PROFESSIONALS
(Revised, Effective January 1, 2015)**

The following represent standards for membership for Financial Professionals (FP) within the Central Ohio Academy of Collaborative Divorce Professionals (COACDP), in order to participate as a Financial Neutral (FN) in the collaborative process.

1. In order to be able to assist clients with the wide range of financial implications of divorce, the FP/applicant must have a good understanding of the financial planning process, as well as the implications associated with various financial decisions involved in the divorce process. Therefore, the FP/applicant must hold one of the three following designations and be currently licensed in good standing: Certified Public Accountant (CPA), Certified Financial Planner (CFP), or Certified Divorce Financial Analyst (CDFA) or have a minimum of 10 years of financial planning experience. At a minimum, the FP/applicant must be able to perform the following tasks:
 - a. Prepare a marital balance sheet, including an after-tax marital balance sheet
 - b. Prepare financial budgets
 - c. Analyze sources of compensation
 - d. Prepare guideline child support worksheets
 - e. Prepare after-tax cash flow schedules
 - f. Trace separate property

Prior to the FP/applicants approval of membership, samples of the above schedules may be requested.

2. For practice as a Collaborative Family Law Financial Neutral, the FP/applicant must have an appropriate background, education and experience in financial planning and financial aspects of divorce, including at least 20 hours of training in financial fundamentals of divorce, which can be fulfilled at either the Institute of Divorce Financial Analysts (Southfield, MI), the Academy for Financial Divorce Practitioners (DePaul, IL), or through selected University, Bar Association, CPA, or other professional programs, as long as continuing education credit is provided for CPA's, CFP's, or CDFA's. Evidence of course completion, or permission to use the designation of Certified Divorce Financial Analyst (CDFA) or Certified Financial Divorce Practitioner (CFDP) will be required. Work experience may be substituted for course completion as evidenced by participation as a financial analyst in at least 20 divorce cases, and written recommendation(s) from family law attorneys involved with those cases.

3. A FP/member must at all times maintain professional liability insurance, and be current in the payment of COACDP membership dues.

ELIGIBILITY FOR MEMBERSHIP IN COACDP

4. In order to understand the interaction with other collaborative professionals, as well as the FP's role within the Collaborative Family Law Process, the FP/applicant must have completed at least 14 hours of an Introductory Collaborative Practice Interdisciplinary Team Training that meets International Academy of Collaborative Professionals (IACP) Minimum Standards for Training before submitting an application for membership. Upon approval of the application by the COACDP Board, the FP/applicant shall qualify for listing on the COACDP membership rolls.

ELIGIBILITY FOR LISTING AS A MEMBER IN GOOD STANDING ON THE COACDP WEBSITE

5. In addition to completion of the requirements for COACDP membership, as set forth above in paragraphs 1 through 4, the FP/applicant must have completed at least 12 hours of Basic Mediation Training before becoming eligible for a listing in the roster of members on the COACDP website; provided, however, if the FP/applicant has not completed such training prior to submitting a membership application, the FP/applicant shall complete such training within 24 months following the COACDP Board's approval of the initial membership application. Failure to complete such basic mediation training within the 24-month period will constitute good cause for the temporary removal of the member's name from the COACDP membership rolls until the member has completed such training.

REQUIREMENT FOR CONTINUING ADVANCED TRAINING

6. After completing all training requirements set forth above in paragraphs 4 and 5, a FP/member shall complete at least three hours of advanced training in conflict resolution, such as: advanced mediation, advanced collaborative practice, communication skills or negotiation skills training within a period of 24 months. Failure to complete such advanced training within the 24-month period will constitute good cause for the temporary removal of the member's name from the COACDP website until the member has completed such advanced training. Attendance at an Annual Forum of the International Academy of Collaborative Practice shall qualify for credit as advanced training under this paragraph.

7. In a case of unusual circumstances, the COACDP Board may approve any reasonable deviation from the requirements as set forth in paragraphs 1 through 6 above.

ETHICAL LIMITATIONS

8. An FP/member who serves in a neutral role in a Collaborative Family Law Process matter shall adhere to such role, and shall not engage in any continuing client relationship that might compromise the FP's neutrality. Working with either client separately after the Collaborative Family Law Process matter has ended is inconsistent with that neutral role. The FP/member must incorporate into the member's Collaborative Participation Agreement a provision disqualifying such member from future work with the client, once the Collaborative Family Law Process matter has ended, 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 collaboration process; and, c.) during the collaborative process, there will be no discussion or solicitation for professional services after the conclusion of the collaborative process.

9. This standard addresses only on-going business standards for Collaborative Family Law Process engagements. It does not apply if the Financial Professional/member has not served as a Financial Neutral in the collaborative engagement. If the FP has assisted with a divorcing client, and the FP is not identified as a participating FN in a Collaborative Process Participation Agreement, the FP may be retained by either or both of the collaborative 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.

10. In a case of unusual circumstances, the COACDP Board may approve any reasonable deviation from the requirements as set forth in paragraphs 8 through 9 above.

CENTRAL OHIO ACADEMY OF COLLABORATIVE DIVORCE PROFESSIONALS
RULE FOR MAINTAINING ELIGIBILITY FOR LISTING IN MEMBERSHIP ROSTER ON
COACDP WEBSITE
(Effective January 1, 2012)

A. After satisfying all training requirements for being listed on the COACDP website, in order to remain eligible for a listing in the roster of members on the COACDP website thereafter, a member must do all of the following:

1. Complete a uniform biographical information form, and update it periodically, as needed, to insure that the information presented is current and accurate.

2. Maintain professional liability insurance, and make timely payment of COACDP annual dues.

3. Commencing in January of 2013, and annually thereafter, on or before the last day of January, each member shall file with the Board of Trustees an itemized report of the total points the member earned during the preceding calendar year from participation in the following list of activities:

a. **BUILDING SKILLS AND MEMBER RAPPORT**

Attend IACP Forum or any collaborative, mediation, communication or negotiation skills training seminars (beyond training required for initial membership eligibility).

Each day of attendance – 2 points

Outside Ohio – Additional 1 point

Attend organization meetings.

Attend COACDP monthly luncheon meeting – 1 point

Attend COACDP Annual Meeting – 2 points

b. **ORGANIZATIONAL ACTIVITIES - PARTICIPATION AND LEADERSHIP**

IACP membership – 1 point

Refer other spouse to CDP member – 1 point

Newsletter Editor – 2 points per issue

Author newsletter article – 2 points

Presenter at CDP monthly luncheon – 2 points

Presenter on Collaborative Family Law at another organization – 2 points

Training seminar administrative/management service – 2 points

Website management – 2 points per year

Mentoring new member – 2 points

Author article on Collaborative Divorce for other publication – 3 points

COACDP Committee member (Attend at least 2/3's of meetings) – 3 points per year

COACDP Standing Committee Chair – 4 points per year

Board of Trustees service (Attend at least 2/3's of meetings) – 4 points per year

4. In order to continue eligibility for listing on the COACDP website for the following calendar year, a member must accumulate a minimum total of eight points during the preceding calendar year. Failure to comply with this Rule will constitute good cause for removing the member's listing from the COACDP website during the succeeding calendar year. Any points earned in excess of eight, up to a maximum of eight additional points, may be carried forward to the next succeeding year. In a case of unusual circumstances, the COACDP Board may approve any reasonable deviation from the requirements as set forth in paragraphs A.1. through A.4.