

## PROGRAM

### MORNING – DAY ONE

8:00-8:30AM Registration and Continental Breakfast

8:30-8:45AM Welcome, Acknowledgements, Introductions  
Historical Perspective and Overview of Program

8:45-9:30AM Demonstration-Attorney Client Interview

- Initial meeting with clients
- Establish rapport with client
- Identify goals and interests
- Determine appropriateness of Collaborative Process for client
- Screen for Domestic Violence Issues – (UCLA Section 15)
  - Informed Consent
  - Reconciliation
  - Post-Nuptial Agreement
  - Litigation – With or Without Attorneys
  - Meditation – Pre-Suit or Post Filing
  - Soft Negotiation
  - Collaborative Process
    - Paradigm shift
    - Use of an interdisciplinary team
    - Transparency of process
    - Disqualification of counsel/withdrawal provision

Telephone conference between Attorneys

Demonstration - Professional Team Pre-Procedural Planning Meeting

9:30-10:15AM Role of the Attorney in Collaborative Process

10:15-10:30AM Questions and Answers

10:30-10:45AM Break

10:45-11:30AM Role of the Mental Health Professional in Collaborative Process

11:30-12:15PM Demonstration: MHP Interview with Client/s

12:15-1:15PM Lunch – Ice breaker and Marketing

## AFTERNOON – DAY ONE

- 1:15-1:30PM      Demonstration: MHP Conference with Attorneys - Discussion of proposed Agenda
- 1:30-2:00PM      Demonstration: Pre-joint meeting of counsel and client
- 2:00-2:30PM      Role of the Financial Professional in Collaborative Process
- 2:30-2:45PM      Questions and Answers
- 2:45-3:00PM      Break
- 3:00-4:00PM      Demonstration: First Team meeting
1. Introductions
  2. Designate person to take Minutes
  3. Review of Collaborative Process
  4. Review of the Participation Agreement
  5. Expectations of Conduct
  6. Sign the Participation Agreement
- Collaborative Process Begins
7. Identify goals, needs and interests
  8. Immediate issues
  9. Discussion of documents and information needed by FP
  10. Discussion of information needed for Parent Plan by MHP
  11. Date of Determination of Status of Assets and Liabilities
  12. Homework
  13. Schedule dates for next 2 meetings
- Demonstration: Debrief of Team Meeting
- 4:00-4:45PM      Collaborative Statutes and Rules
- 4:45-5:00PM      Questions and Answers

## MORNING – DAY TWO

8:00-8:30AM	<u>Continental Breakfast and Networking</u>
8:30-9:15AM	<u>Interest Based Negotiation</u>
9:15-9:30AM	<u>Questions and Answers</u>
9:30-10:00AM	<u>Demonstration: FP Meeting with Wife, Attorney, MHP</u>
10:00-10:15AM	<u>Break</u>
10:15-10:30AM	<u>Demonstration: FP Teleconference with Attorneys</u>
10:30-11:00AM	<u>Demonstration: Attorney, FP, MHP meet w Husband</u>
11:00-12:00PM	<u>Demonstration: Second Team Meeting</u> <u>Review of Goals, Interests and Needs</u> <u>FP- Financial Affidavits</u>
12:00-1:15PM	<u>Lunch</u>

## AFTERNOON – DAY TWO

1:15-1:45PM	<u>Demonstration: Preparation for Third Team Meeting</u> <u>MHP and FP with Attorney and Husband</u>
1:45- 2:45PM	<u>Panel Discussion on Ethical Issues</u>
2:45–3:00PM	<u>Break</u>
3:00- 4:00PM	<u>Demonstration: Third Team Meeting</u> <u>Review of Goals, Interests and Needs</u> <u>Use of Interest Based Negotiation – Attendees</u>
4:00-4:30PM	<u>Execution of Final Agreement</u> <u>Demonstration: Final Debrief and Survey</u>
4:30-5:00PM	<u>Questions and Answers</u>