

## Case Assessment and Development Procedure

- A. Prospective client meets with Attorney. Attorney educates the client about the differing psychological and legal ways to dissolve a marriage. If collaborative divorce is selected, the client is referred to the coach list on the NCCD website and instructed to make an appointment with a coach of their choice.
- B. Client assesses his/her readiness to collaborate with the coach. If client and coach decide on this approach a four-person (two coaches, two clients) meeting is set up.
- C. At the four-person meeting the clients establish their joint vision for 1) the division of their assets and 2) their present and future intentions for co-parenting their children. The coaches continue to assess the clients' readiness for this approach to divorce. They then recommend either an alternative divorce approach or proceed by selecting with the clients, possible dates for a full team and client meeting.
- D. At this meeting the clients will tell their stories while the team (attorneys, coaches, financial expert, child expert if needed) and other client deeply listen. If all agree to proceed, everyone signs the formal agreement to enter into the collaborative divorce process.
- E. During the meetings described in steps A through D, clients pay the professionals their hourly fees at the time the service is provided. Subsequent to the step D meeting, services and fees will be pursuant to the terms of retainer agreements that are signed by the clients with the individual service providers.
- F. Clients and team members may at this time agree to the selection of a case manager.