



VIRGINIA VaCP

Collaborative Professionals

14th Annual Meeting November 15, 2021

Monday, November 15: 8:30 am—4:00 pm

Registration Fee: pay by check or online at VaCP Events

VaCP Members Early Bird rate \$195 through October 15; then \$225
Nonmembers -\$275



A Deeper Dive into the Role of the Child Specialist

Presented by Natalist Goldberg, LCSW and Lisa R. Herrick, Ph.D.

We all know that Collaborative teams turn to child specialists to help bring the voices of the children into the process of creating a child-focused parenting plan. However, teams may not realize child specialists can be not only helpful but essential in facilitating settlement for older clients with adult children who want to convey their ideas to their parents. Child specialists can also help shift parents from an impasse about a weekly parenting schedule to finding a compromise that will truly be in their own children's best interest. Child specialists are able to illuminate the sometimes hidden, or invisible concerns that children have about the changes in their family, and the feedback to parents can create profound insights that help cushion children for the months and years ahead.

Natalie Goldberg LCSW and Lisa Herrick, PhD will review some of their own experiences as child specialists, and share thoughts about the creative uses of this role.



Changes, Practical Applications and Issues now that the UCLA Statute has been Enacted

Presented by: Teresa Cole, JD, Karen Keyes, JD and Cheryl Smith, JD

We worked hard to get the Uniform Collaborative Law Act passed and achieved success! So now what? From intake to case closing, some highlights for practical application. What questions and issues arise because of the new statute? What ethical rules are in play? How does the new statute change the Collaborative Participation Agreement and Collaborative Engagement Agreement we use? Are attorneys required to sign the CPA? What do the Financial Specialists and Mental Health Specialists and other non-party participants need to know? Who can be called to testify? Under what circumstances can an attorney in the "same firm" represent a client in a contested matter? When does the case "end" and how do we communicate that to a client?



Maximizing the Role of a Financial Neutral in Unprecedented Times

Presented by: Jane O. Rowny, CPA, CFP®, CDFA®, Jamie S. Blum, CPA, CDFA®, and Jordan P. Egert, CPA, CFE, CDFA®

Shelter in place, working remotely, altered spending, uncertain income, self-quarantine, large increases – large decreases in assets ... it's no wonder many couples getting divorced or thinking of separating during the current pandemic feel overwhelmed, drained, and confused. Join Jane Rowny, Jamie Blum, and Jordan Egert as they discuss how the financial neutral adds value to the team and client experience in moving towards resolution, how and why they can be utilized in a current and post pandemic world, and innovative tools and analysis that may be available to those professionals and spouses in the collaborative process.



COVID-19 HEALTH AND SAFETY PROTOCOLS

VaCP requests that **only fully vaccinated individuals attend** our 14th Annual Conference in Charlottesville, VA **AND that ALL attendees, regardless of vaccination status, wear masks in all public indoor spaces at the conference**, except while eating, drinking, or speaking from the stage.

If you are unable to be vaccinated due to a health reason or personal belief, you may still attend the conference provided you obtain a negative COVID test result within 24 hours of the Conference. Please email me if you would like more information regarding this option.

This policy comes as result of the evolving health situations all of us face within our communities, and is made in effort to promote safety while attending our 14th Annual Conference. The health and safety of our attendees, speakers, and staff are our highest priorities, and we also want to create a space that enables all of us in Charlottesville to focus on enjoying our time learning from the programs and gathering safely with our Collaboratively minded colleagues.

We will continue to monitor this situation carefully as the Conference date approaches and provide any further updates that may be necessary as this situation evolves.

Please be advised that VaCP's 14th Annual Conference will be an in-person event only and there will not be a virtual option (either live or recorded).

Trainer Biographies

Natalie Goldberg, LCSW is a licensed clinical social worker who has worked with children, adolescents, adults, and families for the past twenty years. Much of Natalie's work focuses on helping clients navigate the challenges of separation, divorce and other life transitions, in addition to working with individuals handle loss and grief, strengthen relationships, improve parenting and co-parenting skills, and address anxiety and depression. In addition to individual and family therapy, Natalie routinely serves as a Collaborative divorce coach, child specialist, parent coordinator, mediator and divorce consultant. She regularly trains Collaborative professionals in Advanced Collaborative and conflict resolution skills.

Natalie has served as President and Board member of the DC Academy of Collaborative Professionals and as a Board member of the Collaborative Professionals of Northern Virginia. She has held the position of co-chair of the Education Committee for both practice groups. She currently serves on the Equity & Inclusion Committee for the International Academy of Collaborative Professionals. She has also served several years on the Board of the Collaborative Project of DC and regularly co-facilitates at Third Thursday, a free monthly workshop on divorce processes in DC. She has been a member of the Collaborative Practice Center of Greater Washington, where attorneys, mental health professionals and financial experts share space and a common vision of changing the way people resolve disputes since its inception. Phone: 301-922-3388; Email: ngoldberglcsw@aim.com

Lisa R. Herrick, Ph.D. is a licensed clinical psychologist who has worked with children, families and couples for thirty years. Dr. Herrick has worked as a Collaborative Coach and as a Child Specialist since 2007 and serves as a custody mediator for separating and divorcing parents. Dr. Herrick provides training programs for professionals throughout the U.S. and Canada in the arenas of Collaborative divorce, mediation and divorce coaching. With Kate Scharff, she has co-authored, [Navigating the Emotional Currents of Collaborative Divorce, A Guide for Enlightened Team Practice](#), (American Bar Association Press, 2010) and [Mastering Crucial Moments in Separation and Divorce](#) (ABA, 2016). Dr. Herrick provides expert witness testimony in cases involving custody, relocation and parenting plans for infants and toddlers. She has practices in downtown Washington, D.C. and in Northern Virginia. T: 703-847-5793; Email: lherrickphd@gmail.com; Website: www.lisaherrick.com

Teresa Cole, JD of Cole Miller PLLC. Ms. Cole received her B.A. from UVA and her J.D. from U.C. Hastings in San Francisco. "Conflict is resolution waiting to happen." With a background in mediation and over 25 years of experience as a family law attorney, Teresa S. Cole works hard on collaborative teams to transform problems into solutions. Teresa previously served as the VaCP Chair and Secretary and as the President of CPNV (Collaborative Professionals of Northern Virginia). She has found that clients are the most satisfied when they have resolved their issues through the collaborative divorce process. She is active in trying to increase public awareness about the collaborative divorce option, and was instrumental in achieving passage of the Uniform Collaborative Law Act in Virginia as one of the Co-Chairs of the VaCP UCLA Taskforce from 2018 to present. She has four children and lives with her husband, Eric, in Tysons Corner. Email: tcole@colemillerlaw.com

Karen L. Keyes, JD has a Mediation and Collaborative Law practice in Arlington, Virginia. Her business is Arlington Collaborative Law PLLC. www.arlingtoncollaborativelaw.com She is a licensed attorney in VA and DC, is a Virginia Certified Mediator (Advanced Family), and has been mediating throughout Virginia, Maryland, and DC, and practicing family law for more than 30 years. Her practice consists of out of court processes with a focus on settlement. Karen served as a Substitute Judge in Northern Virginia and taught as an Adjunct Professor of Alternate Dispute Resolution at George Mason University School of Law before becoming involved in Collaborative Practice. Karen received her initial Collaborative Divorce training in 2003. She has Chaired the Virginia Alternative Dispute Resolution Joint Committee (VSB and VBA), was the first Chair of the Virginia Collaborative Professionals (VaCP), and initial co-chair of the Collaborative Professionals of Northern Virginia (CPNV) in 2006. Karen worked with others on the successful passage of the Uniform Collaborative Law Act in Virginia. Karen serves as the VaCP liaison to the IACP, the VaCP representative to the Global Partners of the IACP and is a member of the UCLA committee of the IACP. She has two grown boys and lives with her husband, Paul Ferguson, and her rescue dog, Ross. She enjoys organic gardening, hiking, biking, swimming, and yoga in her spare time.

Trainer Biographies

Cheryl Watson Smith JD, Cheryl is a Collaborative Family Law attorney and a mediator certified by the Supreme Court of Virginia. She has been in the private practice of law in Roanoke, Virginia since 1988, a mediator since 1994 and a Collaboratively trained attorney since 2004. Through the Collaborative Divorce Process, mediation, and negotiated settlements, she assists families in resolving disputes without going to court. Cheryl is on the faculty of the Collaborative Practice Training Institute (CPTI). Cheryl is a Fellow in the American Academy of Matrimonial Lawyers, a founding member of the Virginia Collaborative Professionals (VaCP), the Collaborative Divorce Professionals of Roanoke and the Southwest Virginia Collaborative Divorce Professionals. Cheryl worked with others on the successful passage of the Uniform Collaborative Law Act in Virginia. She serves as Member Services Committee Chair of the VaCP. She previously served on the Interim Executive Committee and Council of the VaCP, the Virginia State Bar Family Law Section Board of Governors, on the Virginia Bar Association Domestic Relations Section Council, and as President of the Roanoke Valley Family Law Bar Association. She may be reached at 540-265-9022. For more information about Collaborative Divorce and her family's personal journey visit her website: www.cwsmithpc.com

Jane O. Rowny, CPA, CFP®, CDFA® is a Certified Public Accountant, Certified Financial Planner and Certified Divorce Financial Analyst and is a Partner at Councilor, Buchanan and Mitchell, PC. in Bethesda, MD and Washington, DC. Jane's practice focuses on providing financial and tax planning and guidance for divorcing couples and individuals to assist them in making informed decisions on their financial outcomes as well as investment management, financial planning and tax services beyond divorce. Jane has served as a financial neutral in over a hundred collaborative or mediated divorce cases and as the financial expert in several hundred litigated divorce matters and has been practicing this work for over fourteen years. Jane has lectured and provided training to collaborative divorce professionals on varied and substantive financial topics including support, division of assets, budgeting, retirement, rates of return, tax effects and the role of a financial neutral. jorowny@cbmcpa.com www.cbmcpa.com 240-781-6213.

Jamie S. Blum, CPA, CDFA® is a divorce financial and litigation support manager with Councilor, Buchanan & Mitchell, P.C. (CBM). She has more than 30 years of experience in divorce finance, litigation support and accounting. Jamie delivers collaborative, mediation and client advocacy support for financial issues in divorce, expert witness testimony, budgeting, financial analysis of property settlements, retirement and tax projections, and separate and marital property tracing, to name a few services she performs.

As a financial neutral in the collaborative process and a trained mediator, she works with clients and their attorneys to achieve mutually agreeable and fair solutions to the complex financial matters in and beyond their divorce. Jamie understands the divorce process is a very stressful and emotional time for everyone involved. She brings clarity, confidence, and support to her clients throughout their process to make informed and objective financial choices. jblum@cbmcpa.com www.cbmcpa.com 240-781-6217

Jordan P. Egert, CPA, CDFA, CFE is a Certified Public Accountant, Certified Divorce Financial Analyst, and Certified Fraud Examiner – he is a senior manager at Councilor, Buchanan and Mitchell, P.C. and has been practicing accounting and divorce/family financial planning for over thirteen years. His work has involved accounting and financial planning/analysis for support and property division matters in divorce - including cash flow analysis, lifestyle and budget preparation/examination, retirement projections, tax projections, asset and liability division (including tax ramifications), tracing of commingled and separate assets, and tax planning. His experience includes acting as a financial neutral in collaborative and cooperative family law engagements, providing expert witness and attest services, and providing financial and litigation consulting services. Jordan's goal as a financial expert is to ensure those considering or going through a separation/divorce are afforded the opportunity to make the best financial decision/s possible now and into the future. His approach focuses not only on analyzing the numbers but also working with spouses to ensure their thoughts, concerns, and goals are heard and addressed. Jordan has participated in over two hundred family law engagements and is qualified as a financial expert in divorce finances and forensic accounting. Jordan regularly presents on financial planning and divorce finance related topics. He currently sits on the board of Collaborative Professionals of Northern Virginia (CPNV) as the Treasurer. jegert@cbmcpa.com www.cbmcpa.com 240-781-6203.

Sponsors and Supporters will be listed in the written materials as well as on poster displayed at the registration table and acknowledged at the event.

SPONSORS

Platinum: \$1,500 for Lunch Host. *Platinum Sponsors receive one free room at the Omni for the evening of November 14, 2021 and two free registrations.*

Gold: \$1,000 for Lunch Host. *Gold Sponsors receive one free room at the Omni for the evening of November 14, 2021 and one free registration.*



Silver: \$500 for Breakfast Host. *Silver Sponsors receive one free registration.*



SUPPORTERS

Welcome Reception Host: \$200.00

- Cheryl Watson Smith, P.C.

For those arriving the evening prior to the conference, plan to join us for the VaCP Welcome Reception with appetizers and a cash bar in the Omni Pointe Restaurant at 6:00 p.m. to mingle with other Collaborative Professionals. First drink is on us!

CONTINUING EDUCATION CREDITS PENDING APPROVAL

