**Smith Collaborative Meeting**

**January 10, 2023**

**Present: Susan Smith, Sam Smith, Attorney, Attorney, Mental Health Professional, Financial Neutral**

1. Minutes from \_\_\_\_\_\_\_\_\_\_, 2022 meeting were approved.
2. Reviewed Homework:
3. Attorneys reviewed the law on equitable distribution, and reference points for decision making.
4. Discussed option generation for Questions to be Answered:

|  |  |  |
| --- | --- | --- |
| **What to do with our bank accounts?**  | **Susan** | **Sam** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

|  |  |  |
| --- | --- | --- |
| **What to do with our retirement accounts?**  | **Susan** | **Sam** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

|  |  |  |
| --- | --- | --- |
| **What to do with our defined benefit plans?**  | **Susan** | **Sam** |
| 1 | Each keeps his/her own without an offset |  |  |
| 2 | Equally divide the marital portions of each pension |  |  |

|  |  |  |
| --- | --- | --- |
| **What will we do with the house?** | **Susan** | **Sam** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **Homework:**
2. **Agenda for Next Meeting:**
* Review/approve prior meeting minutes.
* Pressing issues?
* Review homework.
* Generate options on:
* Assign homework?
* Schedule additional meetings?
1. **Next meetings:**

Financial Meetings:

* \_\_\_\_\_\_:    9:30am – 11:30am (professionals @ 9:00am)
* \_\_\_\_\_\_:   9:30am – 11:30am (professionals @ 9:00am)

Parenting Meetings:

* \_\_\_\_\_\_: 9:30am – 11:00am
* \_\_\_\_\_\_: 9:30am – 11:00am