**SMITH COLLABORATIVE CASE**

AGENDA FOR INITIAL MEETING

*NOTE: (attorneys and coach(es) are present; financial neutral zooms in for 10-15 minutes)*

1. Summarize participation agreement (10 minutes)
2. Overview of the Collaborative Process (15 minutes):
3. Interest-based negotiations.
4. Reference Points for Decision Making:
   1. Sense of fairness
   2. Interests and needs (of parties and children)
   3. Parties’ relationship (how decisions will affect it)
   4. Law & underlying principles
   5. Practical and economic realities
   6. Prior agreements
   7. Other (cultural, religious, or emotional issues)
5. Roles of the attorneys, coach(es), financial neutral, and potential child specialist
6. Two to three hour meetings.
7. Questions To Be Answered.
8. Collaborative Marital Settlement Agreement.
9. Work between meetings: Debriefings, phone calls/emails, minutes, client check ins, homework.
10. Divorce process.
11. Introduce financial neutral, who explains role, asset/debt schedules, budgets (15 minutes).
12. Discuss overall Goals for the Process (15 minutes).
13. Address any pressing issues (10 minutes).
14. Next steps/homework (5 minutes):
    1. Financial neutral to collect all documents/statements, meet with clients and prepare financial information. [If no financial neutral is used, then next step is to have clients complete the financial worksheet and provide statements for each item to attorneys] This step should be completed before second meeting.
    2. If there are children, meet with coach(es) to begin work on parenting plan. This should be well underway before second meeting.
    3. Hand out sample questions to be answered - clients to review and circle the ones they think about a lot. [Alternatively – if this is too early for these clients, send the questions to be answered after financials are completed.]

1. Confirm next meeting dates.