**IACP 2022 Forum**

**Presentation: Sunday, October 29, 2022**

**Orlando, Florida**

IACP Minimum Ethical Standards:

The Foundation of Collaborative Practice

Presented by: Presenters: Diane Diel, Esq.; Craig Fabrikant, Ph.D.; Ed Sachs, CPA; and Jeffrey Wasserman, Esq.

The IACP Ethical Standards were revised and restated in June 2017 and created new standards and obligations for team communication, advocacy and responsibility for case management.  This lively, interactive workshop will help you apply the new standards to your interdisciplinary teamwork whatever your discipline.

 ***Learning Objectives***:

1. Educate participants about the IACP Ethical Standards, their organization and content.
2. Identify specific confidentiality considerations prior to commencing the collaborative process.
3. Identify issues surrounding termination and withdrawal from the process.

***PRESENTATION OUTLINE***

9 AM – Introductions- Presenters- Audience- Identify Learning Objectives

We are here today to foster the growth and improve public perception of Collaborative Practice by creating awareness of the evolving IACP Ethical Standards and learning and demonstrating how to professionally practice in accordance with those standards.

9:10 - Brief Background of the IACP Ethical Standards and their inter-relationship with the ethical codes of each professional- Model rules of Professional Conduct by ABA (Lawyers), American Psychological Association Ethical Principles of Psychologists and Code of Conduct and CFP Code of Ethics and Standards of Conduct and the American Institute of Certified Public Accountants AICPA Code of Professional Conduct, and other local or interdisciplinary Codes of Ethics.

9:15 - Introduce Addams Family Case-Organize room into breakout discussion groups

9: 20-9:35 Discussion of Conundrum #1- **Confidentiality** both prior to and after Participation Agreement is Signed. Breakout discussion groups to have half this time to discuss, then the assigned presenters to discuss.

9:35-9:45 Discussion of Conundrum #2- **Rules about neutrals** Specific issues related to neutrals, and in this case, the Financial Professional. What are the issues for the Financial Professional addressed by 3.6?

9:45- 10:00 Discussion of Conundrum #3 – **Failure to disclose documents** and provide Transparency

10:00- 10:10 Discussion of Conundrum #4- **Client Self Determination and Team Issues** – what happens when a client wishes to ignore professional team advice and made agreements not supported by the production of information?

10:10-10:20 Discussion of Conundrum #5- **Team and Neutral communication** What can a neutral do independent of the team process?

10:20- 10:30 Discussion of Conundrum #6- **Termination, Resolution and Partial Resolution** – what can be done by whom?