

Advanced Interdisciplinary Training

June 24, 2016

GRAVES, DOUGHERTY, HEARON & MOODY, P.C.

Frost Bank Tower
401 Congress Avenue, Suite 2200
Austin, Texas 78701

Taking Collaborative Team Work to the Next Level

This Advanced Interdisciplinary Training will focus on the specific work of the Neutral Professionals and how attorneys can interact with Neutral Professionals to maximize team function, distribute responsibility and provide a better overall experience for the collaborative client.

The role of the Neutral Professional is crucial to the success of the collaborative process for the client. For the FP, leading dynamic financial option development promotes settlements that meet clients' interests. For the MHP, understanding the myriad issues that need to be addressed when working on the parenting plan and communicating those cost effectively promotes a streamlined collaborative case.

We will offer full-day simultaneous training tracks for the financial and the mental health professionals. Attorneys will attend half-day sessions with each of the neutral disciplines. Our day will conclude with a networking happy hour.

MAXIMIZING THE FINANCIAL PROFESSIONAL IN FINANCIAL OPTION DEVELOPMENT

Steve Walker and David Bouschor

Successful option development around financial issues is key to client satisfaction with the collaborative process. Often option development is nothing more than renaming proposal/counterproposal. The more complex the asset or liability, or the more emotional the clients, the more likely the team is to fall back into more traditional non-interest-based settlement methods. This training will help FPs and attorneys use more creative ways of developing financial solutions for the collaborative clients. FPs will gain confidence to lead the financial option development process to creative solutions for difficult issues such as separate property, closely held businesses, complex retirement issues and securing post-divorce payment obligations.

MAXIMIZING OFFLINE PARENTING PLAN DEVELOPMENT – A NEW GUIDE FOR MHPS AND ATTORNEYS

Honey A. Sheff, Mary Ann Kildebeck, Rhonda Cleaves & Carie Mack

The creativity afforded in collaborative cases often results in unique and very personalized parenting plans for the families involved. Collaborative Divorce Texas realized that creating a comprehensive uniform approach for MHPs to guide and document their offline parenting plan development would greatly benefit the collaborative process. The resulting new Collaborative Divorce Texas Parenting Plan Checklist is designed to help ensure that a comprehensive and uniform parenting plan is developed in the offline process, making attorney review and drafting comprehensive and easy for attorneys – and their staff – to convert into a final order. Utilizing this Checklist will also ensure greater detail and ultimately eliminate ambiguities in parenting plans, which will support the work of the MHP and help reduce attorney time – and cost to clients – for drafting complex decrees and orders.

This training will be beneficial to attorneys and MHPs because it will explain how both groups of professionals can maximize their use of the Checklist to provide the best possible outcomes for their clients. MHPs will get detailed instruction on how to guide clients in their offline development of individual parenting plans using this new checklist and attorneys will gain a more comprehensive understanding of what happens in those offline meetings and the work product resulting from them.

TRAINING SCHEDULE

Friday, June 24, 2016

Registration & Continental Breakfast	9:15 – 10:00 am
<u>SESSION ONE (Lunch Provided):</u>	10:00 am – 1:15pm
Maximizing the Financial Professional in Financial Option Development, Session I: For FPs Only	
Maximizing Offline Parenting Plan Development, Session I: For MHPs and Attorneys	
BREAK	1:15 pm – 1:30 pm
<u>SESSION TWO</u>	1:30 pm – 4:30 pm
Maximizing the Financial Professional in Financial Option Development, Session II: For FPs and Attorneys	
Maximizing Offline Parenting Plan Development, Session II: For MHPs Only	
NETWORKING HAPPY HOUR	4:30 pm – 5:45 pm

FACULTY

Steve Walker, CPA

Steve Walker began his career in 1977 with Peat Marwick Mitchell & Co. (now known as KPMG). Since 2005, Mr. Walker's professional practice has focused exclusively in the areas of forensic accounting, litigation support, investigative accounting and professional training. During his 35+ year career, he has worked as an auditor, computer audit specialist, tax specialist, personal financial specialist, business appraiser, forensic accountant and mediator. After working at KPMG, he went into private practice specializing in tax and litigation support. He was one of the first CPAs to earn a special accreditation in personal financial planning and served on a national committee of the AICPA. For 11 years, he worked at Koons, Fuller, Vanden Eykel & Robertson advising them on characterization, valuation, tax, investigative and financial issues related to family law matters. Steve is a certified public accountant, personal financial specialist, certified fraud examiner, and registered investment advisor. He is a member of the American Institute of Certified Public Accountants and the Denton County Collaborative Professionals. He currently serves on the board of trustees of the Collaborative Divorce Texas.

David Bouschor, JD

David Bouschor is a 1991 graduate of the Southern Methodist University Dedman School of Law. In 1998 he opened the Law Office of David S. Bouschor, II, P.C. in Denton, Texas. For over twenty years, Mr. Bouschor's legal career has consisted of practicing in Family Law, Guardianship, Probate, Probate Litigation and Collaborative Divorce. He is a firm believer in dispute resolution through negotiation, however, he has proven himself to be a skilled litigator. Mr. Bouschor is currently an active member of several professional organizations, including the College of the State Bar of Texas, the Texas Academy of Family Law Specialists and the International Academy of Collaborative Professionals (IACP). He has also spent significant time training other professionals on the collaborative approach and process, and has shared his expertise on this topic with international audiences.

Honey A. Sheff, Ph.D

Dr. Honey Sheff is a licensed Clinical Psychologist, and holds a Graduate Certificate Degree in Dispute Resolution. She has almost 40 years of clinical experience, with expertise in family issues, divorce, and family violence. Her current clinical work is primarily focused in Collaborative Practice, where she serves in the roles of Neutral Mental Health Professional and Child Specialist, and in Parenting Coordination.. Her therapy practice is largely devoted to marital counseling, working with individuals who are dealing with divorce, and helping children whose parents are divorcing. She lectures and trains locally and nationally, and is a member of many professional organizations where she often participates on working committees or serves leadership roles. She was on the faculty of the University of Texas Southwestern Medical Center, and taught for 14 years at the University of Texas at Dallas.

MaryAnn Kildebeck, LCSA

MaryAnn is a Psychotherapist with a diversified practice as Collaborative Divorce MHP, Parenting Facilitator/Coordinator, Custody and Adoption Evaluator, Family/Individual Therapist and Mediator. She has completed over 500 parenting plan proposals for attorneys and judges. As a trainer with New Paradigm Training, Global Collaborative Law Council and COLLABORATIVE DIVORCE TEXAS, she has trained hundreds of collaborative professionals working to promote the Collaborative movement.

Rhonda Cleaves, JD

Rhonda graduated *summa cum laude* from Stephen F. Austin State University with a B.A. in history, psychology and communications and earned her law degree from The University of Texas School of Law, then spent a year in Mexico studying international law. After that she worked for Texas Rural Legal Aid, assisting clients in both family law and civil litigation disputes. She later moved to Dallas, where she represented victims of asbestos-induced mesothelioma before opening her own firm in 2002 to practice exclusively in the area of family law. Rhonda has been recognized as a *Texas Rising Star* and was selected by her peers for inclusion in the 2016 *Best Lawyers®* listing in the areas of Collaborative Law and Family Law. She is active at the local and state level in organizations that promote collaborative law education and has served as president of the Collaborative Law Alliance of Collin County from 2013 to 2015.

Carie Mack, JD

Carie Mack is a family lawyer and mediator committed to collaborative practice. A native Texan, she graduated from SMU Law School in 1999 and started her career in private practice at a major civil litigation firm in Dallas. After 5 years of insurance defense work, she realized that her skills were better suited working directly with families and focusing on conflict resolution. Carie has been a sole practitioner in Allen for 10 years and is very involved with the Collin County Bar Association. She is a frequent presenter on collaborative law at the local, state and international (IACP) level and has been recognized by her peers in Texas Super Lawyers, Rising Star Edition (2011-2013) and Best Lawyers in America, Collaborative Law (2015-2015) and Family Law (2016).

GENERAL INFORMATION

ADVANCED TRAINING

This Advanced Interdisciplinary training is intended for collaborative practitioners who have completed Basic Interdisciplinary training and have experience participating in collaborative cases.

TUITION:

~~**EARLY BIRD RATE:** Before May 24, 2016: Member* \$300 and non-member \$335.~~

REGULAR RATE: After May 24, 2016: Member* \$340 and non-member \$375.

AT THE DOOR: Member* \$450 - non-member \$500 only if space is available, with no guarantee of lunch

REFUNDS: Full refunds will be given if requested more than 10 days before the date of the event.

***Member rates apply to Collaborative Divorce Texas and State Bar of Texas Collaborative Law Section members**

CONTINUING EDUCATION CREDIT: Collaborative Divorce Texas is applying for credit with the State Bar of Texas, Texas State Board of Social Workers Examiners and Texas State Board of Examiners of Professional Counselors and the Texas State Board of Public Accountancy. Collaborative Divorce Texas will assist in providing materials for participants to submit for credit to other professional Boards not listed here. Continuing Education credit is anticipated to be approved for 6.0 hours.

HOTEL OPTIONS: The training is in the Frost Bank Tower in downtown Austin. Some nearby hotel options for you to consider are 1) **JW Marriott Austin**, 110 E 2nd St., Austin, TX 78701, (512) 474-4777, www.jwmarriottaustin.com 2) **Residence Inn Austin Downtown/Convention Center**, 300 E 4th St., Austin, TX 78701, (512) 236-8008, <http://www.marriott.com/hotels/travel/ausrd-residence-inn-austin-downtown-convention-center/> 3) **Hampton Inn & Suites Austin – Downtown/Convention Center**, 200 San Jacinto Blvd., Austin, TX 78701, (512) 472-1500, <http://hamptoninn3.hilton.com/en/hotels/texas/hampton-inn-and-suites-austin-downtown-convention-center-AUSDTHX/index.html>

For Questions call: 972-386-0158 (Ronda) or email ronda@collaborativedivorcetexas.com

Advanced Training REGISTRATION

Name: _____

Street Address: _____

City, State, Zip: _____

Phone # () _____ Fax: () _____

Email: _____

PROFESSIONAL INFORMATION

I am an Attorney Mental Health Professional Financial Professional Other

Type of Certification (i.e., Ph.D., MSW, LPC, CPA, CDFA, CFP) _____

I am am not a member COLLABORATIVE DIVORCE TEXAS / SBOT CLS

I have have not had prior collaborative training

PAYMENT INFORMATION

Payment by Check:

Check # _____: for ~~___\$300___~~ ~~___\$335___~~ ___\$340___ ___\$375___ ___\$450___ ___\$500___ made payable to: Collaborative Divorce Texas is enclosed

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REGULAR RATE: after May 24, 2016 on: Member \$340 and non-member \$375.

AT THE DOOR: Member \$450 and non-member \$500 only if space is available, with no guarantee of breakfast/lunch

Payment by CC:

Name on Card: _____

CC # _____

TYPE: Visa MC AmX Expiration Date: _____ Security Code: _____

Street Address: _____

City, State, Zip: _____

Signature authorizing CC transaction: _____

If paying by check: Please fill in the registration form and mail to: Ronda Robinson, COLLABORATIVE DIVORCE TEXAS, 5420 LBJ Freeway, Suite 626, Dallas, TX 75240

If paying by Credit Card: Please fill in the Registration form and either mail it to the above or fax it or email it to 469-374-9699 -- ronda@collaborativedivorcetexas.com. For Questions call: 972-386-0158.