



COLLABORATIVE DIVORCE VANCOUVER SOCIETY

Email: info@collaborativedivorcebc.com
www.collaborativedivorcebc.com

MEMBERSHIP APPLICATION FORM – FINANCIAL SPECIALISTS 2018/2019

Membership with the *Collaborative Divorce Vancouver Society* ("CDV"), provides:
Opportunities for professional networking and practice building, attendance at informational dinner meetings for which continuing education credits may be obtained (currently at an estimated additional cost of \$55 per dinner), and referrals through website listing and other social media platforms.

Contact Information:

| | | | |
|----------------------|-------|--------------------|----------------------|
| Name: | _____ | | |
| Company: | _____ | | |
| Bus. Address: | _____ | | |
| City: | _____ | Prov: _____ | Postal: _____ |
| Tel: | _____ | Fax: _____ | |
| Email: | _____ | | |

By providing my email address I agree to receive CDV's member newsletter and other email communications, as email is the CDV's primary form of communication. Note: Members can withdraw from electronic communication at any time. Member email addresses will not be shared outside of the CDV.

Professional Degrees & Affiliations:

All CDV members must review the International Academy of Collaborative Professionals (IACP) Standards and Ethics Guidelines in detail at least once per year. The IACP Standards and Ethics Guidelines were initially adopted by the IACP Board of Directors on October 13, 2011 and were amended on June 21, 2017.

<https://www.collaborativepractice.com/sites/default/files/IACP Standards and Ethics 2018.pdf>

I am applying for membership in one of the following categories:

1. PARTICIPATING MEMBER: (check all that apply)

Please contact our administrative assistant, Wendy Leung (at info@collaborativedivorcebc.com) if you are not a member of one of the associations listed below.

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Member in good standing with: <ul style="list-style-type: none"> <input type="checkbox"/> Chartered Professional Accountants of British Columbia (CPABC) and I have a Chartered Professional Accountant designation <input type="checkbox"/> Canadian Institute of Chartered Business Valuators (CICBV) and I have a Chartered Business Valuator (CBV) designation <input type="checkbox"/> Financial Planners Standards Council (CFP) <input type="checkbox"/> Two day basic multi-disciplinary collaborative training* <input type="checkbox"/> Three day interest-based mediation training* <input type="checkbox"/> Possess professional liability insurance <p style="color: red; font-size: small;">* attach copy of certificates or letters of completion</p> | <ul style="list-style-type: none"> <input type="checkbox"/> I am interested in participating on one (or more) of the following (current) committee(s) [for the 2018/2019 membership period]: <ul style="list-style-type: none"> <input type="checkbox"/> PR/marketing/website/social media <input type="checkbox"/> Dinner meetings <input type="checkbox"/> Governance and succession planning/nominations <input type="checkbox"/> Membership and Best Practices <input type="checkbox"/> Training and members retreat <input type="checkbox"/> Mentorship/practicum |
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Participating Membership Fee: \$325 per year (Pro-rated fees starting February 1st: \$150)

- To become a member, I will execute the attached Participating Member Pledge and agree to be bound by its terms.
- I have reviewed in detail the International Academy of Collaborative Professionals Standards & Ethics Guidelines in the last 12 months ([https://www.collaborativepractice.com/sites/default/files/IACP Standards and Ethics 2018.pdf](https://www.collaborativepractice.com/sites/default/files/IACP%20Standards%20and%20Ethics%202018.pdf)).

Participating Members are required under the CDV Bylaws to be members of the International Association of Collaborative Professionals (IACP). Please check your IACP account (<https://www.collaborativepractice.com/user/login>) to confirm your membership is up-to-date. IACP will contact you when your renewal is due.

- I will renew my IACP membership when notified and provide confirmation to info@collaborativedivorcebc.com.**

2. GENERAL MEMBER - AFFILIATE: (check all that apply)

Please contact our administrative assistant, Wendy Leung (at info@collaborativedivorcebc.com) if you are not a member of one of the associations listed below.

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Member in good standing with: <ul style="list-style-type: none"> <input type="checkbox"/> Chartered Professional Accountants of British Columbia (CPABC) and I have a Chartered Professional Accountant designation <input type="checkbox"/> Canadian Institute of Chartered Business Valuators (CICBV) and I have a Chartered Business Valuator (CBV) designation <input type="checkbox"/> Financial Planners Standards Council (CFP) <input type="checkbox"/> Two day basic multi-disciplinary collaborative training* <input type="checkbox"/> Three day interest-based mediation training* <input type="checkbox"/> Possess professional liability insurance <p style="color: red; font-size: small;">* attach copy of certificates or letters of completion</p> | <ul style="list-style-type: none"> <input type="checkbox"/> I am interested in participating on one (or more) of the following (current) committee(s) [for the 2018/2019 membership period]: <ul style="list-style-type: none"> <input type="checkbox"/> PR/marketing/website/social media <input type="checkbox"/> Dinner meetings <input type="checkbox"/> Governance and succession planning/nominations <input type="checkbox"/> Membership and Best Practices <input type="checkbox"/> Training and members retreat <input type="checkbox"/> Mentorship/practicum |
|--|--|

General Membership Fee: \$220 per year (Pro-rated fees starting February 1st: \$85)

You will be featured on our website as a supporter of the Collaborative process.

- To become a member, I will execute the attached General Member Pledge and agree to be bound by its terms.

- I have reviewed in detail the International Academy of Collaborative Professionals Standards & Ethics Guidelines within the past 12 months ([https://www.collaborativepractice.com/sites/default/files/IACP Standards and Ethics 2018.pdf](https://www.collaborativepractice.com/sites/default/files/IACP_Standards_and_Ethics_2018.pdf)).

3. GENERAL MEMBER - APPRENTICE: (check all that apply)

Please contact our administrative assistant, Wendy Leung (at info@collaborativedivorcebc.com) if you are not a member of one of the associations listed below.

- Member in good standing with:
 - Chartered Professional Accountants of British Columbia (CPABC) and I have a Chartered Professional Accountant designation
 - Canadian Institute of Chartered Business Valuators (CICBV) and I have a Chartered Business Valuator (CBV) designation
 - Financial Planners Standards Council (CFP)
- Possess professional liability insurance

General-Apprentice Membership Fee: \$220 per year (Pro-rated fees starting February 1st: \$85)
You will be featured on our website as an Apprentice.

- I intend to pursue the required Collaborative and Mediation Training with the objective of becoming a Participating Member within two years from the date of my initial application to CDV.
- To become a member, I will execute the attached General Member Pledge and agree to be bound by its terms.
- I have reviewed in detail the International Academy of Collaborative Professionals Standards & Ethics Guidelines ([https://www.collaborativepractice.com/sites/default/files/IACP Standards and Ethics 2018.pdf](https://www.collaborativepractice.com/sites/default/files/IACP_Standards_and_Ethics_2018.pdf)).

Payment Method:

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Cheque enclosed (payable to Collaborative Divorce Vancouver Society) <input type="checkbox"/> Please charge my Visa <input type="checkbox"/> Please charge my Mastercard | <p><u>For credit card payments only:</u></p> <p>Card Number: _____ Expiry: ____ / ____</p> <p>Name on Card (please print): _____</p> <p>Signature: _____</p> |
|---|--|

MAIL COMPLETED FORM (with payment and enclosures) TO:

Attn: W. Leung, CDV Administrator
 #125-8120 Jones Road
 Richmond, BC V6Y 4K7

Date: _____

 Participating/General Member

COLLABORATIVE DIVORCE VANCOUVER

PARTICIPATING MEMBER PLEDGE FOR FINANCIAL SPECIALISTS

As a Participating Member of Collaborative Divorce Vancouver Society ("CDV"), as defined in the Bylaws, I pledge that I will:

1. Engage in the Collaborative model of dispute resolution in accordance with the Bylaws of the CDV.
2. Complete a minimum 6 hours of training relating to Collaborative practice during each year of membership.
3. Attend at least 50% of dinner meetings of the CDV per year.
4. Over every three-year period: (1) serve as an active member in good standing on the Board of Directors, or (2) serve as an active member of a committee.
5. Participate fully and in good faith in a facilitation pursuant to the attached Professional Relationship Assistance Protocol (PRAP) to which I am invited by another Collaborative member to resolve any disputes or address any issues including but not limited to matters regarding best practices in Collaborative practice, challenges encountered in a case or any relationships between or among the professionals in a Collaborative team.
6. I will maintain my membership in the International Academy of Collaborative Professionals, as required under the Bylaws.
7. I agree that I will engage with, and speak of, all other members of the CDV with courtesy, respect and in good faith, and will not attempt to injure, by statement or innuendo, the professional reputation of any other member.
8. I further agree:
 - a. That every Collaborative family law case in which I participate includes signing a Participation Agreement for financial specialists which includes, without exception, the following terms:
 - i. An agreement not to participate in any contested family law proceedings after the Participation Agreement is signed, and
 - ii. To terminate any working relationship with the Collaborative lawyers involved in the case.
 - iii. A Collaborative financial specialist must withdraw from the Collaborative case in the event that they learn that their client has withheld or misrepresented information and continues to withhold and misrepresent such information, or otherwise acted so as to undermine or take unfair advantage of the Collaborative Process. The Collaborative financial specialist who withdraws will advise the other Collaborative financial specialist that he or she is withdrawing and that the Collaborative Process must end.
 - b. In any case where all of the conditions of paragraph 6(a) above are not met, I expressly agree not to create, support, or allow any impression that the case and/or my representation is Collaborative and to affirmatively dispel any confusion or impression which may arise that the case is being handled as a Collaborative case.

Dated: _____

Participating Member:

COLLABORATIVE DIVORCE VANCOUVER

GENERAL MEMBER PLEDGE

As a General Member of Collaborative Divorce Vancouver Society (“CDV”), as defined in the Bylaws, I pledge that:

1. I will continue to be supportive of the Collaborative Process but will not engage as a professional working within the Collaborative Process as defined in the Bylaws of Collaborative Divorce Vancouver.
2. I will not create, support or further an impression that I am a professional working within the Collaborative Process.
3. I agree that I will engage with, and speak of, all other members of the CDV with courtesy, respect and in good faith, and will not attempt to injure, by statement or innuendo, the professional reputation of any other member.

Dated: _____

General Member:

COLLABORATIVE DIVORCE VANCOUVER

PROFESSIONAL RELATIONSHIP ASSISTANCE PROTOCOL (PRAP)

1. Purpose:

To provide a safe and confidential place for Collaborative professionals to address:

- a. Process issues or problems that develop in a specific Collaborative case, or
- b. An issue or problem that develops in the relationships between or among Collaborative professionals

so that the public can be assured that all CDV Members will practice collaboratively and at the highest level of his or her competence and integrity.

2. Steering Committee:

The Board of Directors will appoint a Steering Committee comprised of one lawyer and one mental health professional who are Participating Members or Honourary Members of the CDV. The mandate of the Committee will be to seek a reasonable resolution of the issue or problem. The Committee can be expanded if deemed necessary by the committee members.

3. Facilitator:

The Steering Committee will invite one or more trained Collaborative professional(s), from within or outside of the Association, or a qualified mediator to provide the facilitation. The facilitator(s) will have wide discretion in the conduct of the facilitation including determining who should participate in the process and in making recommendations to the participants. If the facilitator is a Member of the CDV, he or she will be given credit for his or her service towards the CDV's annual training requirements.

4. Facilitation Process:

A Collaborative professional seeking facilitation will first consult with the other Collaborative professionals involved (including all appropriate team members if the matter arises in the context of a specific case) to identify the issues for which the requesting Member seeks the facilitation process. The Member will give written notice to the Board of Directors of the CDV (the "Board") requesting case facilitation and providing a summary of the issues for which facilitation is requested, including the names of the Collaborative professionals involved.

5. Confidentiality:

Prior to starting the facilitation process, all participants in the facilitation will sign a confidentiality agreement in a form approved by the Board.

6. Requirement to Participate in Case Facilitation:

The CDV membership form, through the Participating Member Pledge, will require participation in good faith in any case facilitation in which a Member is invited to participate.