



COLLABORATIVE DIVORCE VANCOUVER SOCIETY

Email: info@collaborativedivorcebc.com

www.collaborativedivorcebc.com

MEMBERSHIP APPLICATION FORM – FINANCIAL SPECIALISTS 2019/2020

Membership with the Collaborative Divorce Vancouver Society ("CDV"), provides opportunities for professional networking and practice building, attendance at informational dinner or lunch meetings where continuing education credits may be obtained (additional meal costs are often applicable), and referrals through website listing and other social media platforms.

Contact Information:

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

(EMAIL is VERY IMPORTANT as it is our primary means of communication with members)

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. These Guidelines can be found at this link:

<https://www.collaborativepractice.com/sites/default/files/IACP%20Standards%20and%20Ethics%202018.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.

- Member in good standing with:
 - Chartered Professional Accountants and/or
 - Chartered Accountants of Canada (CA or CICA)
 - Chartered Business Valuator (CBV)
 - Certified Management Accountant of BC (CMA)
 - Certified General Accountants Association of BC (CGA)
 - Financial Planners Standards Council (CFP)
 - Two day basic multi-disciplinary collaborative training*
 - Three day interest based mediation training*
 - Possess professional liability insurance
- * attach copy of certificates or letters of completion
- Am interested in participating on one (or more) of the following (current) committee(s) for the 2019/2020 membership period (see Member Pledge below, for details on nine-hour participation requirement):
 - PR/marketing/website/social Media
 - Writing one or more CDV blog posts and/or updating the CDV website (time spent writing legal information posts *should be* eligible for BC Law Society CPD credits)
 - Training and/or Members' Retreat
 - Public Education (work on creating content for, organizing & giving presentations)
 - Governance and succession planning/nominations
 - Membership and Best Practices
 - Mentorship
 - Dinner meetings

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. <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.

- I will renew my IACP membership 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.

- Member in good standing with:
 - Chartered Professional Accountants and/or
 - Chartered Accountants of Canada (CA or CICA)
 - Chartered Business Valuator (CBV)
 - Certified Management Accountant of BC (CMA)
 - Certified General Accountants Association of BC (CGA)
 - Financial Planners Standards Council (CFP)
 - Two day basic multi-disciplinary collaborative training*
 - Three day interest based mediation training*
 - Possess professional liability insurance
- * attach copy of certificates or letters of completion
- Am interested in participating on one (or more) of the following (current) committee(s) for the 2019/2020 membership period:
 - PR/marketing/website/social Media
 - Writing one or more CDV blog posts and/or updating the CDV website (time spent writing legal information posts *should be* eligible for BC Law Society CPD credits)
 - Training and/or Members' Retreat
 - Public Education (work on creating content for, organizing & giving presentations)
 - Governance and succession planning/nominations
 - Membership and Best Practices
 - Mentorship
 - Dinner meetings

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%20Standards%20and%20Ethics%202018.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 and/or
 - Chartered Accountants of Canada (CA or CICA)
 - Chartered Business Valuator (CBV)
 - Certified Management Accountant of BC (CMA)
 - Certified General Accountants Association of BC (CGA)
 - Financial Planners Standards Council (CFP)
- Possess professional liability insurance

General-Apprentice Membership Fee: \$345 per year (Pro-rated fees starting February 1st: \$210)

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 within the past 12 months. <https://www.collaborativepractice.com/sites/default/files/IACP%20Standards%20and%20Ethics%202018.pdf>.

Payment Method:

- Cheque enclosed (payable to Collaborative Divorce Vancouver Society)
- Please charge my Visa
- Please charge my Mastercard

For credit card payments only:

Card Number: _____ Expiry: ____ / ____

Name on Card (please print): _____

Signature: _____

MAIL COMPLETED FORM (with payment and enclosures) TO:

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

ALTERNATIVELY, SCAN AND EMAIL COMPLETED FORM (with credit card information and enclosures) TO:

Attn: W. Leung, CDV Administrator
Email: info@collaborativedivorcebc.com

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 and/or participate in any combination of the following Society educational events and/or initiatives and/or volunteer opportunities covering at least nine (9) hours per year, such as:
 - (i) monthly dinner and/or lunch meeting(s), as may be scheduled by the Board;
 - (ii) annual or bi-annual retreats, study groups and/or workshops of the Society;
 - (iii) Society sponsored formal training(s) and initiatives with an educational component;
 - (iv) acting as a mentor or being a mentee (for newer members), for a term of at least 12-months;
 - (v) volunteer to be a trainer and/or presenter at a Society sponsored event(s), such as dinner meeting(s), training(s), retreat(s), public education event(s), etc.;
 - (vi) writing original content for the CDV blog, newsletter, website, and other social media and marketing initiatives; and/or
 - (vi) Such other Society events and/or initiatives and/or volunteer opportunities as may be designated by the Board to qualify for this participation requirement, which may include volunteering on the Board and/or a Society Committee.
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.