



MEMBERSHIP APPLICATION FORM – FINANCIAL SPECIALISTS 2020/2021

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; providing your email address confirms you give the CDV permission to contact you via email)

Professional Degrees & Affiliations:

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

- Participating Member** *Member with voting rights who can sign Participation Agreements.*
- General Member – Apprentice (Pledge Option 1)** *working towards becoming a Participating Member and intend to pursue or are pursuing Mediation training with the objective of becoming a Participating Member within 2 years of your membership application, unless granted an extension by application to the Board. You have completed at least 12 hours of basic Interdisciplinary Collaborative training (qualified Collaborative training must meet the IACP Minimum Standards for trainings) but have not completed the required mediation training.*
- General Member – Apprentice (Pledge Option 2)** *working towards becoming a Participating Member and intend to pursue or are pursuing Collaborative and Mediation training with the objective of becoming a Participating Member within 2 years of your membership application, unless granted an extension by application to the Board. You have **not** completed at least 12 hours of basic Interdisciplinary Collaborative training (qualified Collaborative training must meet the IACP Minimum Standards for trainings).*
- General Member – Affiliate** *Supporter of Collaborative Process NOT working towards being a Participating Member.*

Although not required, the CDV strongly recommends that all members take a Family Violence Screening course.

All CDV members, in all membership categories, must review the International Academy of Collaborative Professions (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. The IACP Standards and Ethics Guidelines can be found at the following link:

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

Participating Membership: \$325 (Pro-rated starting February 1st: \$150)

Required:

1. Member in good standing with (check all that apply):
 - Chartered Professional Accountants of BC (CPA)
 - Chartered Business Valuator (CBV)
 - Certified Financial Planner with FP Canada (CFP)
2. *Two-day (or longer) basic multi-disciplinary Collaborative training that meets or exceeds IACP Minimum Standards
3. *Three-day interest-based mediation training
* attach copy of certificates or letters of completion
4. Possess professional liability insurance
5. To become a member, I will execute the attached Participating Member Pledge and agree to be bound by its terms.
6. The Participating Member Pledge and CDV Bylaws include a requirement to be active in CDV activities. There are many areas where members can have an impact. Please indicate if you are interested in volunteering in one of the following areas for the 2020/2021 membership period:
 - Recruitment & Diversity Committee
 - Social Media/Marketing Committee
 - Writing one or more CDV blog posts and/or updating the CDV website
 - CDV Newsletters (writing/curating content)
 - Training Committee (continuing education for Members)
 - Public Outreach (creating content for, organizing & giving presentations)
 - Members' Retreat Committee
 - Best Practices Committee
 - Mentorship Committee
 - Dinner Meeting Committee
 - Lunch Meeting Committee
 - Social Events Committee
7. **Participating Members are required under the CDV Bylaws to be members of the International Association of Collaborative Professionals (IACP). CDV Members are expected to become IACP members as soon as their CDV membership is approved, and to maintain their IACP membership as long as they are CDV members.**

I will create an IACP account as a CDV Whole Group Member and renew my IACP membership on an annual basis. When my CDV membership is approved, I will join the IACP and provide confirmation to info@collaborativedivorcebc.com.

Apply for your IACP membership at <https://www.collaborativepractice.com/civicrm/profile/create?gid=20&reset=1>. Make sure you select Collaborative Divorce Vancouver as your "Primary Practice Group" to receive the IACP's USD \$145 discounted rate. Go to <https://www.collaborativepractice.com/user/login> each year to confirm your membership remains up-to-date.

8. I have reviewed in detail the IACP's Standards & Ethics Guidelines.

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

General-Apprentice Membership (Pledge Option 1): \$220 (pro-rated starting February 1st: \$85)

You will be featured on our website as an Apprentice Member.

Required:

1. Member in good standing with (check all that apply):
 - Chartered Professional Accountants of BC (CPA)
 - Chartered Business Valuator (CBV)
 - Certified Financial Planner with FP Canada (CFP)
2. Possess professional liability insurance
3. I have taken a two-day (or longer) basic multi-disciplinary Collaborative training* that meets or exceeds IACP Minimum Standards as I wish to begin working on Collaborative files under a signed Participation Agreement as an Apprentice Member under the terms in pledge option 1.
* attach copy of certificate or letter of completion.
4. I intend to complete the required three days of interest-based mediation within two years of my membership application.
5. To become a member, I will execute Option 1 of the attached General Member-Apprentice Pledges and agree to be bound by its terms.
6. 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>

Optional:

7. Apprentice members are not required under the CDV Bylaws to be members of the International Association of Collaborative Professionals (IACP). However, there are many advantages of joining IACP.

Apply for your IACP membership at <https://www.collaborativepractice.com/civCRM/profile/create?qid=20&reset=1>. Make sure you select Collaborative Divorce Vancouver as your "Primary Practice Group" to receive the IACP's USD \$145 discounted rate. Go to <https://www.collaborativepractice.com/user/login> each year to confirm your membership remains up-to-date.

8. General-Apprentice Members are eligible to volunteer on any CDV committee. If you are interested in being contacted by any of the following committees, please select the applicable box(es):
 - Recruitment & Diversity Committee
 - Social Media/Marketing Committee
 - Writing one or more CDV blog posts and/or updating the CDV website
 - CDV Newsletters (writing/curating content)
 - Training Committee (continuing education for Members)
 - Public Outreach (creating content for, organizing & giving presentations)
 - Members' Retreat Committee
 - Best Practices Committee
 - Mentorship Committee
 - Dinner Meeting Committee
 - Lunch Meeting Committee
 - Social Events Committee

General-Apprentice Membership (Pledge Option 2): \$220 (pro-rated starting February 1st: \$85)

You will be featured on our website as an Apprentice Member.

Required:

1. Member in good standing with (check all that apply):
 - Chartered Professional Accountants of BC (CPA)
 - Chartered Business Valuator (CBV)
 - Certified Financial Planner with FP Canada (CFP)
2. Possess professional liability insurance
3. To become a member, I will execute Option 2 of the attached General Member-Apprentice Pledges and agree to be bound by its terms.
4. 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>

To be Completed Within Two Years of Joining CDV:

5. *Two-day (or longer) basic multi-disciplinary Collaborative training that meets or exceeds IACP Minimum Standards
6. *Three days interest-based mediation training

* attach copy of certificates or letters of completion

Optional:

7. Apprentice members are not required under the CDV Bylaws to be members of the International Association of Collaborative Professionals (IACP). However, there are many advantages of joining IACP.

Apply for your IACP membership at <https://www.collaborativepractice.com/civcrm/profile/create?gid=20&reset=1>. Make sure you select Collaborative Divorce Vancouver as your "Primary Practice Group" to receive the IACP's USD \$145 discounted rate. Go to <https://www.collaborativepractice.com/user/login> each year to confirm your membership remains up-to-date.

8. General-Apprentice Members are eligible to volunteer on any CDV committee. If you are interested in being contacted by any of the following committees, please select the applicable box(es):
 - Recruitment & Diversity Committee
 - Social Media/Marketing Committee
 - Writing one or more CDV blog posts and/or updating the CDV website
 - CDV Newsletters (writing/curating content)
 - Training Committee (continuing education for Members)
 - Public Outreach (creating content for, organizing & giving presentations)
 - Members' Retreat Committee
 - Best Practices Committee
 - Mentorship Committee
 - Dinner Meeting Committee
 - Lunch Meeting Committee
 - Social Events Committee

General-Affiliate Membership: \$220 (pro-rated fees starting February 1st: \$85)

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

Required:

1. Member in good standing with (check all that apply):
 - Chartered Professional Accountants of BC (CPA)
 - Chartered Business Valuator (CBV)
 - Certified Financial Planner with FP Canada (CFP)
2. Possess professional liability insurance
3. To become a member, I will execute the attached General Member-Affiliate Pledge and agree to be bound by its terms.
4. 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>

Optional:

5. Affiliate members are not required under the CDV Bylaws to be members of the International Association of Collaborative Professionals (IACP). However, there are many advantages of joining IACP.

Apply for your IACP membership at <https://www.collaborativepractice.com/civcrm/profile/create?gid=20&reset=1>. Make sure you select Collaborative Divorce Vancouver as your "Primary Practice Group" to receive the IACP's USD \$145 discounted rate. Go to <https://www.collaborativepractice.com/user/login> each year to confirm your membership remains up-to-date.

6. General-Affiliate Members are eligible to volunteer on any CDV committee. If you are interested in being contacted by any of the following committees, please select the applicable box(es):
 - Recruitment & Diversity Committee
 - Social Media/Marketing Committee
 - Writing one or more CDV blog posts and/or updating the CDV website
 - CDV Newsletters (writing/curating content)
 - Training Committee (continuing education for Members)
 - Public Outreach (creating content for, organizing & giving presentations)
 - Members' Retreat Committee
 - Best Practices Committee
 - Mentorship Committee
 - Dinner Meeting Committee
 - Lunch Meeting Committee
 - Social Events Committee

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 at 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, 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 specialist professionals 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 mental health professional 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 mental health professional who withdraws will advise the other Collaborative mental health professional that he or she is withdrawing and that the Collaborative Process must end.
 - b. In any case where all of the conditions of paragraph 8(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 Signature

COLLABORATIVE DIVORCE VANCOUVER

GENERAL MEMBER-APPRENTICE PLEDGE

(APPRENTICE PLEDGE OPTION 1)

As an Apprentice General Member of Collaborative Divorce Vancouver Society (“CDV”), as defined in the Bylaws who wants to begin working on Collaborative files with signed Participation Agreements prior to completing my CDV training, 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 (meaning a process governed by a Participation Agreement, as so defined), however:
 - a. **if I have completed the multi-disciplinary Collaborative training and plan to join the CDV as a Participating Member within two years,** but am still in the process of attending the interest-based mediation training, I may engage in a Collaborative Process under a signed Participation Agreement , as detailed in the Participating Member Pledge above, if:
 - i. the other professional(s) involved in the matter are Participating Members of the CDV;
 - ii. I have a formal mentor under the CDV’s Mentorship Program;
 - iii. I disclose to all prospective Collaborative clients that I am an Apprentice General Member and still have mediation prerequisites to complete;
 - iv. I attend diligently to pre-meeting and/or post-meeting ‘de-briefs’ after all collaborative meetings; and
 - v. I complete the mediation training as soon as possible, but within the required time limits (presently two years from becoming a Member).
2. Unless permitted under clause 1(a) above, 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.

TO APPRENTICE GENERAL MEMBERS: YOU MAY SIGN APPRENTICE PLEDGE OPTION 2 IF YOU DO **NOT** WISH TO COMPLETE THE INTERDISCIPLINARY COLLABORATIVE TRAINING AND BEGIN WORKING ON COLLABORATIVE FILES WITH SIGNED PARTICIPATION AGREEMENTS **PRIOR** TO COMPLETING ALL PARTICIPATING MEMBER REQUIREMENTS AND BECOMING A PARTICIPATING MEMBER.

Dated: _____

General Member (Apprentice) Signature

COLLABORATIVE DIVORCE VANCOUVER

GENERAL MEMBER-APPRENTICE PLEDGE

(APPRENTICE PLEDGE OPTION 2)

As an Apprentice General 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.

TO APPRENTICE GENERAL MEMBERS: YOU MAY COMPLETE THE APPRENTICE PLEDGE OPTION 1 IF YOU HAVE ALREADY COMPLETED OR PLAN TO COMPLETE THE INTERDISCIPLINARY COLLABORATIVE TRAINING THIS YEAR AND WISH TO SIGN PARTICIPATION AGREEMENTS PRIOR TO COMPLETING ALL CDV REQUIREMENTS TO BECOME A PARTICIPATING MEMBER.

Dated: _____

General Member (Apprentice) Signature

COLLABORATIVE DIVORCE VANCOUVER

GENERAL MEMBER-AFFILIATE PLEDGE

As an Affiliate 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 (Affiliate) Signature

**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.