

# Collaborative Divorce Association of the Capital District

## Financial Professional Membership Application

\*\*Please print clearly and complete all fields below. This information is used to compile the CDACD membership directory\*\*

### Background:

Name: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Office Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Facsimile: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Degree and Date Awarded: \_\_\_\_\_

Number of Collaborative Cases in prior year: \_\_\_\_\_

I am currently involved in a practice group: YES  NO

I am interested in joining a practice group: YES  NO

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### Membership/Licensing:

\_\_\_\_ (initial) I am a financial professional with a license in good standing as:

- Certified Financial Planner (CFP)
  - Certified Public Accountant (CPA)
  - Certified Management Accountant (CMA)
  - Certified Divorce Financial Analyst (CDFA)
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### Training Requirements:

1.  I have three (3) years of experience and education in the financial aspects of divorce and/or personal financial planning concepts, which may include cash management and spending plans, retirement and pension plans, income tax, investments, real estate, insurance, property valuation and division, individual and family financial planning concepts, detailed as follows (attach additional sheets as needed): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- I have not yet met the above guideline.

## Collaborative Divorce Association of the Capital District

2.  I have completed additional education in the financial fundamentals of divorce giving the financial professional a basic understanding of family law including: divorce procedures; property valuation and division; pensions and retirement plans; budgeting income and expenses; child and spousal support; future income projections; financial implications of different scenarios for settlement, detailed as follows (include dates and program and attach additional sheets as needed, but if renewing membership, please only indicate training for prior year): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of Hours: \_\_\_\_\_

- I have not yet met the above guideline.

3.  I have completed Mediation Training (including divorce mediation) as follows:  
(If renewing membership, please only indicate training information for prior year.)

Course/Trainer(s) \_\_\_\_\_

Location/Date: \_\_\_\_\_

Number of Hours: \_\_\_\_\_

Course/Trainer(s) \_\_\_\_\_

Location/Date: \_\_\_\_\_

Number of Hours: \_\_\_\_\_

- I have not yet met the above guideline.

4.  I have completed Interdisciplinary Collaborative Practice Training  
taught by trainers who meet the IACP minimum standards for trainers as follows:  
(If renewing membership, please only indicate training information for prior year.)

Course/Trainer(s) \_\_\_\_\_

Location/Date: \_\_\_\_\_

Number of Hours: \_\_\_\_\_

- I have not yet met the above guideline.

5.  I have completed Family Law training designed to give the financial professional a basic understanding of family law in this jurisdiction as follows:  
(If renewing membership, please only indicate training information for prior year.)

Course/Trainer(s) \_\_\_\_\_

Location/Date: \_\_\_\_\_

Number of Hours: \_\_\_\_\_

- I have not yet met the above guideline.
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# Collaborative Divorce Association of the Capital District

**By signing below, I agree to the following (check each individually and sign below):**

- I commit to follow the purpose and mission of the Collaborative Divorce Association of the Capital District which is “to advance and promote the principles of collaboration in divorce and family law, which fosters marriage dissolution and the resolution of family related matters in an environment without animosity or recrimination; to elevate the standards of integrity, honor and courtesy in the legal profession, and to foster cooperation among the legal profession, mental health profession, financial profession and other professionals serving the public in divorce and family matters.” I will strive to practice in a manner consistent with the International Academy of Collaborative Professionals Principles of Collaborative Practice and Ethical Standards.
- I agree to abide by the standard Participation Agreement issued by CDACD, and to commit to the principles and guidelines of CDACD, including all provisions requiring confidentiality and that the professionals withdraw if the matter results in contested litigation.
- I agree to attend at least ten (10) hours of continuing education every two (2) years which may include at least four (4) hours each year of collaborative training offered by CDACD or its equivalent. Such training may include topics specific to the collaborative process, or, "cross-training", i.e., courses in disciplines, other than my own profession, which are useful in the collaborative process. I understand that if I do not complete this training during the requisite time frame, I may not be eligible for renewal of my membership.
- I agree to complete three (3) hours of family law training every 36 months, or as required by the By-Laws of CDACD.
- I understand that I will be listed as a member in CDACD brochures, advertising materials, and on the CDACD website, and I consent to receive emails from CDACD regarding membership issues, meetings, and general information (not advertisements).

**I AGREE TO ABIDE BY THE FOREGOING AGREEMENTS AND PRINCIPLES.**

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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Please submit the following by **January 31<sup>st</sup>** to complete your application:

1. Completed membership application
2. Annual dues of \$325\* (made out to “CDACD”)

Mailing address:  
CDACD  
P.O. Box 38165  
Albany, New York 12203

Note: The dues will be for the coming calendar year and the amount due includes \$100.00 for IACP membership for the coming year. Timely payment of annual dues is required to maintain your membership in CDACD.

**\* EARLY BIRD SPECIAL:**

**If you submit your dues by December 31st, dues will only be \$300.00 instead of \$325.**