

## CP CAL CONFERENCE XIII

# CONFERENCE AT-A-GLANCE

### Friday, April 27

- 8:00am–9:00am Continental Breakfast/Registration Open  
9:00am–4:15pm Pre-Conference Institutes (6 hours):  
PCI #1 Severance/Fosgate/Aronsohn: Clients Entrenched? Use Motivational Interviewing to Evoke Change in CDR  
PCI #2 Proudfoot/McClelland/Weber: Marketing Collaborative Practice - Getting Cases!  
12:00pm–12:45pm Lunch  
4:15pm–5:45pm Delegates Meeting/Reception  
5:45pm–7:30pm Conference XIII Reception (no host)  
7:30pm–10:00pm Dine Around

### Saturday continued...

- 3:45pm–5:15pm Concurrent Workshops (1 1/2 hours):  
#11—Moshier/Ogborne: Ready to Climb? The Staircase to a Collaborative Law Practice  
#12—Wroolie/Nobler: Diminished Capacity and Undue Influence: Impact on Estates, Divorce and the Team  
#13—Jacobson, et al.: Family Residence Issues and Why They Drive Us Crazy  
6:00pm–11:30pm Dinner, Eureka Awards, Music and Dancing

### Saturday, April 28

- 6:30am–7:30am Yoga with Kelly Anne Nitschke  
7:45am–8:45am Continental Breakfast and Report from the CP Cal Board of Directors  
8:45am–12:00pm Single Workshop (3 hours)  
#1—Conner: Law 101-Divorce for Non-Lawyers  
8:45am–10:15am Concurrent Workshops (1 1/2 hours):  
#2—Nastari, et al.: Gray Divorce: What Will the Children Say?  
#3—Blythe/Rapoport/Severance: Best Practices in Divorce Options Marketing  
10:30am–12:00pm Concurrent Workshops (1 1/2 hours):  
#4—Carey, et al.: The Unique Skill Set of the Child Specialist as a Family Focused Facilitator in Collaborative Divorce and Mediation Meetings  
#5—Laird, et al.: Collaborative Trusts & Estates-What's It All About?  
#6—Blythe/Rapoport/Proudfoot: Divorce Options - Hands On Social Media Marketing  
12:00pm–1:45pm Luncheon and Plenary I with Lane Arye, Ph.D.  
"Beyond Polarization"  
2:00pm–5:15pm Single Workshop (3 hours):  
#7—Richardson/Hill/Hughes Enrolling the Client and the Spouse Into Collaborative Practice  
2:00pm–3:30pm Concurrent Workshops (1 1/2 hours):  
#8—Russell: Takin' It To The Courts: Santa Clara County Superior Court's Collaborative-Based Program for Families with Children Under 5  
#9—Johnson, et al.: Trusts & Estates Legacy Planning: Before the Crisis, the Opportunity  
#10—Ault-Riché: EMDR Therapy as an Adjunct Modality in Divorce Mediation

### Sunday, April 29

- 6:45am–7:45am Coyote Point Group Walk  
8:00am–9:30am Breakfast and Plenary II with Cat Zavis, JD, MA:  
"Healing a Broken World: The Connection Between Collaborative Practice and Social Change"  
9:30am–12:45pm Single Workshop (3 hours):  
#14—Rubin: Using Internal Family Systems to Manage Conflict in the Collaborative Process  
9:30am–11:00am Concurrent Workshops (1 1/2 hours):  
#15—Ross/Laird: The Secrets We Know and the Ethical Challenges They Bring  
#16—Proudfoot: Blogging-How to Write, Post and Promote Web Content  
11:15am–12:45pm Concurrent Workshops (1 1/2 hours):  
#17—Nobler/Ross: Collaborative Estates 5, Bringing it All Together  
#18—McLarnan-Dugan: Beyond Collaborative Dissolutions-Expanding Your Collaborative Practice to Assist the Family in Other Areas of the Law  
#19—Crowley/Garcia: Mortgage Financing Strategies in Divorce

#### CONFERENCE CO-CHAIRS

Gloria Flores-Cerul, JD, Co-Chair 2018 • Neil Penn, MFT, Co-Chair 2018  
Meredith G. Lewis, JD, Chair 2019

#### PROGRAM COMMITTEE

Hal Bartholomew, JD  
Cathy Daigle, CFP®, CDFA®  
David A. Fink, JD  
Wendy Jones, JD  
George Richardson, JD  
Dawn Strachan, CDFA®

Questions? Contact:

Erin Keller • 415-399-8393 • erin@cpcal.com  
Christine Maderos • 925-566-8590 • christine@cpcal.com

# The Roots and Branches of Collaborative Practice

## PRE-CONFERENCE INSTITUTES

Friday, April 27, 2018 • 9:00am - 4:15pm • San Mateo Marriott

Registration for Pre-Conference Institutes is in addition to registration for the Conference. See Registration Form.

### PCI #1 – Clients Entrenched? Use Motivational Interviewing to Evoke Change in CDR

Ria Severance, MA, LMFT, Jami Fosgate, JD, Mary Ann Aronsohn, MA, LMFT



Motivational Interviewing (MI) is a powerful, evidence-based change model, with 30 years of research substantiating its effectiveness in addiction treatment and other fields. CDR professionals learn how MI helps clients: (a) identify their core values, (b) access their own motivation to move past resistance towards difficult lifestyle changes, and (c) become agreement-ready. Participants gain a succinct overview of how MI enhances CDR, watch MI in action, and practice multiple dynamic MI skills in a CDR context.

### PCI #2 – Marketing Collaborative Practice: Getting Cases!

Beth Proudfoot, MFT, Beth McClelland, MBA, CDFA®, CFP™, Shawn Weber, JD, CFLS

You've taken all the classes. You're passionate about Collaborative. You're ready. But where are the cases? In this hands-on, interactive class, we will work together to understand marketing strategies that work and how they apply to you. You'll leave the class excited to begin the process of coordinating efforts with other Collaborative professionals to create a firehose of clients who are appropriate for Collaborative Practice coming into Divorce Options and into your office.

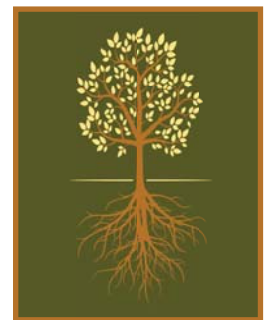


**C** COLLABORATIVE  
PRACTICE CALIFORNIA

Friday, April 27, 2018

# CONFERENCE XIII

# OPENING



**Reception**  
(No Host)

5:45pm - 7:30pm

*Dine-Around*  
7:30pm - 10:00pm

Questions? Contact:

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Christine Maderos • 925-566-8590 • christine@cpcal.com

**CP CAL CONFERENCE XIII**  
**The Roots and Branches of Collaborative Practice**

# Collaborative Tracks



## MARKETING

PreConference Institute #2—Proudfoot/McClelland/Weber: Marketing Collaborative Practice: Getting Cases!

Workshop #3—Blythe/Rapoport/Severance: Divorce Options - Best Practices in Divorce Options Marketing

Workshop #6—Blythe/Rapoport/Proudfoot: Divorce Options - Hands On Social Media Marketing

Workshop #7—Richardson/Hill/Hughes: Enrolling the Client and Spouse Into Collaborative Practice

Workshop #16—Proudfoot: Blogging-How to Write, Post and Promote Web Content



## TRUSTS & ESTATES

Workshop #5—Laird/McClelland/Britany/Hoffman: Collaborative Trusts & Estates-What's It All About?

Workshop #9—Johnson/Ross/Laird/del Monte: Trusts & Estates Legacy Planning: Before the Crisis, the Opportunity

Workshop #12—Wroolie/Nobler: Diminished Capacity and Undue Influence: Impact on Estates, Divorce and the Team

Workshop #15—Ross/Laird: The Secrets We Know and the Ethical Challenges They Bring

Workshop #17—Nobler/Ross: Collaborative Estates 5, Bringing it All Together

**Register Now!**

**[www.conference.cpcal.com](http://www.conference.cpcal.com)**

# The Roots and Branches of Collaborative Practice

**SATURDAY, APRIL 28, 2018**

**6:30am-7:30am**

## **YOGA**

*All Levels*

Kelly Anne Nitschke

triYoga Flow

Just for Collaborative Professionals

Gentle Yoga to Start Your Day



Bring your yoga mat and comfortable clothes, and start your day off right!

**7:45am-8:45am**

## **Continental Breakfast and Report from the CP Cal Board of Directors**

Meet CP Cal's 2018-2019 Board of Directors! Join the BOD for breakfast as they report on the previous year's successes and plans for the coming year.

**8:45am-12:00pm**

## **Concurrent Workshops (3 hours w/break at 10:15)**

### **#1 – Law 101: Divorce Law for Non-Lawyers**

*All Levels*

Catherine Conner, JD, CFLS

Do you find yourself puzzled, intrigued, or perhaps nodding off, when lawyers start talking about the law in a Collaborative meeting? This workshop for Collaborative professionals who are not lawyers will educate you about the fundamentals of California divorce law.

**8:45am-10:15pm**

## **Concurrent Workshops (1.5 hours)**

### **#2 – Gray Divorce: What Will the Children Say?**

*Beginner/Intermediate*

Linda Nastari, LCSW, Sally Cooperrider, JD, Pam Flournoy, CDFA®, CFP™, David Weinberg, JD, CFLS

This presentation will address the legal, financial, emotional, and estate planning complexities of divorce later in life. Gray divorces often include issues of adult child relationships, estate planning, retirement income, and health care expenses. A divorce later in life may create losses to a person's sense of security and desirability as well as to their financial options. This seminar will examine the value of the Collaborative Practice team approach to this growing segment of the divorcing population.

### **#3 – Divorce Options: Best Practices in Divorce Options Marketing**

*All Levels*

Don Blythe, MBA, CPA, CDFA®, Lissa Rapoport, JD, Ria Severance, MA, LMFT

Our Collaborative Practice California committee on Divorce Options has reached out to each Collaborative practice group in California to determine which Divorce Options marketing efforts have been used successfully and which unsuccessfully by each particular group. Our workshop presents the Best Practices in Divorce Options marketing gleaned from our polling. We communicate in detail the results of

**10:30am-12:00pm**

## **Concurrent Workshops (1.5 hours)**

### **#4 – The Unique Skill Set of the Child Specialist as a Family Focused Facilitator in Collaborative Divorce and Mediation Meetings**

*All Levels*

Bart J. Carey, JD, Cathleen Collinsworth, CDFA®, MAFF®, Bruce R. Fredenburg, LMFT, Carol R. Hughes, Ph.D., LMFT

Child Specialists (CSs) are usually the least understood and most underutilized team professionals. CSs glean a wealth of essential information about family dynamics, emotional triggers and hidden agendas. Even experienced practitioners can fail to appreciate how CSs, integrated as coequals at meetings, are often the only professional with the standing to bring warring couples to agreement. Lawyers, Financial Specialists and MHPs, will learn how pioneering interdisciplinary teams innovatively employ CSs on Collaborative Divorce and Mediation Teams to shift clients toward agreement, simultaneously improving cost efficiency.

**10:30am-12:00pm**

## **Concurrent Workshops (1.5 hours)**

### **#5 – Collaborative Trusts and Estates: What's It All About?**

*All Levels*

R. Kamela Laird, JD, Beth McClelland, MBA, CDFA®, CFP®, Keith Britany, LMFT, Chandler Hoffman, Psy.D.

Find out what is happening with Trusts and Estates Collaborative Practice. Learn about where it came from and where we are headed. See how it applies to both estate planning and postmortem cases. We will introduce you to the Trust and Estate Options program for public education and provide ideas for jump starting this for your practice groups with suggestions for developing the team and marketing to both professionals and the public.

**Register Now!**

**[www.conference.cpcal.com](http://www.conference.cpcal.com)**

# CP CAL CONFERENCE XIII

**SATURDAY, APRIL 28, 2018** continued

**10:30am–12:00pm**

**Concurrent Workshops (1.5 hours)**

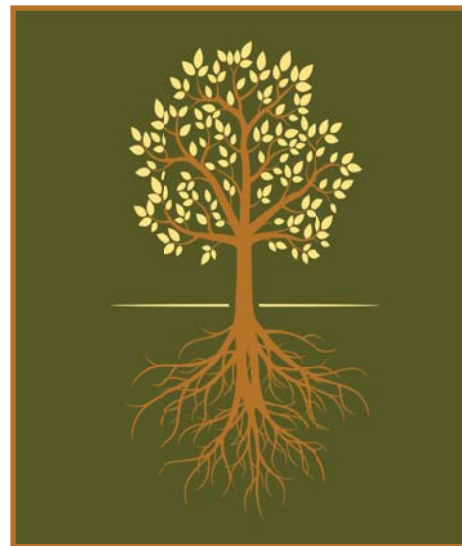
## **#6 – Divorce Options: Hands On Social Media**

### **Marketing**

*All Levels*

Don Blythe, MBA, CPA, CDFA®, Lissa Rapoport, JD, Beth Proudfoot, LMFT

This is a HANDS-ON workshop about how to successfully implement Best Practices in Divorce Options marketing. We will examine the techniques beneath the social media platforms of Facebook, LinkedIn, Meetup, Next Door, Twitter, Webinars, Videos and others as well as the techniques of successful referral outreach efforts to MFTs and psychologists, court services and attorney groups and financial professionals such as CFPs and CPAs. Bring your laptops and we'll help you learn by doing.



**12:00pm - 1:45pm**

## **Luncheon and Plenary I**

Lane Arye, Ph.D.

### **“Beyond Polarization”**

In these divisive times we are reminded how important it is to communicate across differences. The same dynamics that create impasse between divorcing couples also drive wedges between countries or political parties. Drawing on his experience working with conflicts across the globe, Arye will outline universal patterns that escalate and solidify conflicts. He will also share practical tools for creating understanding, empathy, and resolution. Noticing and working with these patterns in ourselves can increase our effectiveness with clients.



Lane Arye, Ph.D. facilitates individuals, couples, teams, organizations and communities locally and around the world. He co-led a six-year UN funded project in the Balkans working with Serbs, Croats and Muslims to build sustainable community after the war. He has also worked with conflicts between high-caste and low-caste Hindus in India, anti-Semitism in Germany and Poland, as well as racism, sexism, nationalism, homophobia, and class issues in the US and Europe. In Oakland, he resolved long-standing conflict between then mayor (now governor) Jerry Brown and an African American cultural arts center. He also coaches leaders, and helps businesses, teams, and social change organizations resolve their internal conflicts in order to be more effective in the world. Co-author of “Transforming Conflict into Community: Post-war Reconciliation in Croatia,” Lane works in private practice in the San Francisco Bay Area, where he lives with his wife and two children.

**2:00pm–5:15pm Single Workshop (3 hours)**

## **#7 – Enrolling the Client and Spouse Into Collaborative Practice**

George B. Richardson, JD, CFLS, Mark Hill, CFP®, CDFA®, Carol Hughes, Ph.D., LMFT

Informed decisions are a Key focus in the Collaborative process and can mean the difference between not only getting more Collaborative cases, but also completing them successfully. How effectively are you conveying Collaborative process information? How is that information conveyed to your client's spouse? Together, we will analyze presentation tools that have proven effective for leaders in the collaborative field.

**2:00pm–3:30pm Concurrent Workshops (1.5 Hours)**

## **#8 – Takin' it to the Courts: Santa Clara County Superior Court's Collaborative-Based Program for Families with Children Under 5**

Karen Drury Russell, JD

This program will focus on the Young Children's Settlement Teams (YCST) project of the Santa Clara County Superior Court and how the Collaborative model has been put into practice in family court for families with children under 5. The workshop will provide background and implementation as well as a team demonstration.

Questions? Contact:

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# The Roots and Branches of Collaborative Practice

**SATURDAY, APRIL 28, 2018** continued

**2:00pm–3:30pm Concurrent Workshops (1.5 Hours)**

## #9 – Trusts and Estates Legacy Planning: Before the Crisis, the Opportunity

Peter W. Johnson, Jr., Nancy J. Ross, LCSW, BCD, R. Kamela Laird, JD, Richard del Monte, CFP®

Join us as we explore the exciting opportunity to help families proactively build strong foundations that can help them successfully navigate the stressful, life-changing loss of loved ones, and thrive. Discover the ways in which the Collaborative Practice structure is ideally suited to help families before damaging conflict arises, filling in the missing pieces where traditional estate planning too often falls short. Practical, actionable tools will be provided, as will guidance on next steps for those interested in pursuing this highly rewarding path of service.

## #10 – EMDR Therapy as an Adjunct Modality in Divorce Mediation

Marianne Ault-Riché

This workshop will address disturbing couple interactions in divorce mediation (and couple therapy) where clients are triggered by their partners' verbal and nonverbal behavior such that calm, collaborative conversation seems no longer possible. Marianne will discuss Francine Shapiro's AIP (Adaptive Information Processing) model and the 8 steps of EMDR Therapy which reduces reactivity by "metabolizing" the triggers responsible for it. She will demonstrate how EMDR Therapy can be introduced as an adjunct modality in the divorce mediation process.

**3:45pm–5:15pm Concurrent Workshops (1.5 Hours)**

## #11 – Ready to Climb? The Staircase to a Collaborative Law Practice

Jennifer K. Moshier, JD, Michelle N. Ogborne, JD

You are ready to grow your Collaborative practice, ready to climb the stairs – you just need to know where the stairs even start. Building a Collaborative law practice is a process. Let's create your process now!

## #12 – Diminished Capacity and Undue Influence: Impact on Estates, Divorce and the Team

Tonita Wroolie, Ph.D., ABPP, Alan Nobler, JD

Serious issues and unforeseen consequences to estate planning or divorce settlements may occur when diminished capacity or undue influence is present. Compromised decision-making can negatively impact family relationships and impede the Collaborative process. Subjective assessment of capacity is prone to error and the use of an objective assessment can provide the Collaborative team and family members with an understanding of challenging behaviors as well as inform the needs of the impaired adult. This session addresses the role of the elder specialist.

## #13 – Family Residence Issues and Why They Drive Us Crazy

Jeffery S. Jacobson, JD, CFLS, Jaye-Jo Portanova, MD, Elizabeth Potter Scully, JD, Dawn Strachan, CDFA®

The family residence is a challenging issue because it (a) is symbolic and emotionally laden; (b) requires complex financial analyses and (c) requires resolution of complex legal issues. This workshop will provide tools for practitioners to assist clients in leveraging the interdisciplinary skills of the Collaborative Team and the power of the Collaborative Process to come up with workable, lasting, interest-based and creative solutions.



## Dinner, Eureka Awards Music and Dancing 6:00pm–11:30pm

Join us for dinner and come support your colleagues as they receive their Eureka Awards in CP Cal's 12th Annual Eureka Awards Ceremony, and then CELEBRATE with the CP Cal Community by dancing the night away to DJ Jerry Saucedo and saxophonist Noel Catura!

## Register Now!

[www.conference.cpcal.com](http://www.conference.cpcal.com)

Questions? Contact:

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### Eureka Honorees

The Eureka Award recognizes and honors those who "have made significant contributions and demonstrated an abiding dedication to establishing and sustaining Collaborative Practice in California."

The Eureka Award is not limited to those in any particular practice or career. Previous honorees include members of the core disciplines—mental health, financial and legal—as well as those who are not licensed in these professions.

The Eureka Award was established in 2006 as part of the very first Celebration of Collaborative Practice in Sonoma, California, and actually pre-dates the founding of CP Cal. In its first two years, the Eureka Award Committee chose to play "catch up" and honored several recipients each year. In 2008, the CP Cal Board chose to limit the Eureka Award to three to five Honorees.

### Past Recipients

<b>2006</b> Honorable Aviva Bobb Cathy Daigle Kim Davidson Mark Hill Jennifer Jackson David Kuroda Alan Nobler George Richardson Chip Rose Nancy Ross Pauline Testler Peggy Thompson Donna Beck Weaver	<b>2007 cont...</b> David Fink Paula Jackson Mike Lowy Rod Nurse Steve Popell Jean Petrick Pete Roussos David Weinberg	<b>2009</b> Natalie Leininger Lisa Murray Leslee Newman Emily Weaver	<b>2012</b> Bart Carey Jane Euler Arlene Kostant John McDaniel Karen Russell	<b>2015</b> Paul Brimberry Kevin Chroman Cathleen Collinworth Thellen Levy Shawn Weber
<b>2007</b> Peg Anderson Hal Bartholomew Catherine Conner	<b>2008</b> Randy Cheek Shari DeLisle Liz Ferris Fred Glassman Kathleen O'Connor	<b>2010</b> Suzan Barrie Aiken Karen Heller Berdy Judi Foley Amy Rodney Dawn Strachan	<b>2013</b> Debra Bellings-Kee Ann Buscho Steven Garelick Brian Don Levy Lisa Schneider	<b>2016</b> Mary Ann Aronsohn Melanie Belmont Keith Britany Melva Warnier Lisa Zonder
		<b>2011</b> Mark Berke Carol Hughes Steve Rutten Warren Sacks Len Weiler	<b>2014</b> Jay Bray Susan Campbell Stephanie Maloney Joseph P. Spirito, Jr. Jude Sterling	<b>2017</b> Kathleen Faulkner Diana Martinez Tracy McKenney Beth Proudfoot Lynn Verdone

# CP CAL CONFERENCE XIII

**SUNDAY, APRIL 29, 2018**

**6:45am-7:45am**

## **COYOTE POINT GROUP WALK**

*All Levels*

Lace up your best walking shoes and join your friends and colleagues for a scenic walk on one of the Coyote Point Recreation Area Trails located just 3 miles from the San Mateo Marriott. The trails range from just 0.6 miles to 1.2 miles and each offer views of the bay and its diverse wildlife. A great way to start your day!



**8:00am-9:30am**

## **Breakfast and Plenary II**

### **“Healing a Broken World: The Connection Between Collaborative Practice and Social Change”**

Cat Zavis, JD, MA

We live in a world where money and power are rewarded more than love, generosity, care, and justice. Unless we address this directly, it impacts our clients and limits our effectiveness. Part of our task as Collaborative professionals is to bring our skills to movements that seek societal transformation and share our ethical vision with clients so they can understand how their personal struggles are impacted by collective societal struggles and together work to bring Collaborative values to society-at-large.



Cat Zavis, JD, MA is the Executive Director of the Network of Spiritual Progressives (NSP), a collaborative divorce attorney, mediator, coach, and trainer in conflict resolution and empathic communication. She is currently pursuing a Master's Degree in Jewish Studies and Rabbinic ordination through Aleph – the Jewish Renewal Ordination Program. Since the November election, she has been leading trainings for hundreds of people on Spiritual Activism: Strategies for Our Times in an effort to help people understand the underlying psycho-spiritual crisis in our society that has given rise to our current situation and ways to transform our society to one of love and justice. Cat has a unique ability, using her empathic training and expertise, to draw connections between people's personal life struggles and the larger social context and systems in which they live, empowering people to change not only their personal lives but also society as a whole.

**9:30am-12:45pm Single Workshop (3 hours)**

### **#14 – Using Internal Family Systems to Manage Conflict in the Collaborative Process**

Barton H. Rubin, Ph.D.

Managing conflict can be difficult when the clients' limbic system's negative bias is activated. However, Internal Family Systems (IFS) model teaches us that engaging with the limbic system performs an important function. This program will introduce participants to the concepts of IFS and provide practical tools for using this model to manage conflict in the Collaborative Process.

**9:30am-11:00am Concurrent Workshops (1.5 hours)**

### **#15 – The Secrets We Know and the Ethical Challenges They Bring**

Nancy J. Ross, LCSW, BCD, R. Kamela Laird, JD

Keeping confidences is part of the work we do, but in Collaborative Practice we have ethical guidelines that help us determine when or even if to reveal a 'secret'. However, families in the planning stage of Trusts and Estates practice can present complex ethical issues that aren't always as clean-cut as they are in Collaborative Divorce. This workshop will focus on the unique challenges families present when they ask, "Can you keep a secret?" along with guidelines for ethical decision-making.

### **#16 – Blogging: How to Write, Post, and Promote Web Content**

Beth Proudfoot, LMFT

Many Collaborative professionals know they "should" write content for their own, or their practice group's website. Stop procrastinating and come to this presentation. We will learn some "tricks of the trade" about writing for the web, brainstorm, outline, and write. Bring your sharp pencil or laptop. Note: a videographer will be available throughout the conference, by appointment, for an additional fee of \$75 per edited 2-minute video.

**11:15am-12:45pm Concurrent Workshops (1.5 hours)**

### **#17 – Collaborative Estates 5 - Bringing It All Together: Catching the Wave to Build A Collaborative Estates Practice**

Alan L. Nobler, JD, Nancy J. Ross, LCSW, BCD

After attending multiple Estates classes, practitioners will want to know what happens next? How do they actually integrate what they have just learned into their practice? How does Estate work differ from Divorce work? What knowledge and skills do they need to begin to actually work on cases? This workshop will fill in some the 'gaps' for those who want to begin Collaborative Trusts and Estates cases.

# CP CAL CONFERENCE XIII - April 27-29, 2018

The Roots and Branches of Collaborative Practice

## SUNDAY, APRIL 29, 2018

11:15am–12:45pm Concurrent Workshops  
(1.5 hours)

### #18 – Beyond Collaborative Dissolutions: Expanding Your Collaborative Practice to Assist the Family in Other Areas of the Law

Linda L. McLarnan-Dugan, JD

Use the Collaborative model to expand your practice to assist clients with developing pre-marital agreements later in life, issues they may be facing when preparing their estate plan, handling the estate of a loved one who did not have an estate plan at the time of their death, working with parents to protect their special needs child[ren]'s government benefits, and provide tools to protect aging relatives from undue influence through the use of geriatric evalua-

### #19 – Mortgage Financing Strategies in Divorce

Jason Crowley, CFA®, CFP™, CDFA®, Ross Garcia, CDLP

Join us for a presentation covering what you need to know about mortgages and divorce lending. Ross and Jason will offer practical recommendations covering:

- Refi Buyouts & post-divorce purchasing power
- Leveraging the mortgage as a settlement tool
- Lender Guidelines & Requirements
- Creative workarounds to lender criteria

### 2-DAY BASIC INTERDISCIPLINARY COLLABORATIVE PRACTICE TRAINING

CP Cal is pleased to partner with the Sacramento Collaborative Practice Group in offering a two-day training in advance of the Conference (Thursday-Friday, April 26-27, 2018). The training meets the IACP minimum standards for basic training. Continuing education credits are available. MCLE (16), BBS (16), and CFP® (13). For more information and to register, [click here](#), and/or contact LindieSCPG@divorceoption.com or call Lindie or Hal Bartholomew at 916-455-5200.

**Discount for Conference Attendees!**

### CANCELLATION POLICY

Full refund less a \$25 administrative fee if cancelled by March 26, 2018. 50% refund if cancelled by April 14, 2018.

**No refunds thereafter.**

### HOTEL INFORMATION

**San Mateo Marriott, San Francisco Airport**  
**1770 South Amphlett Blvd.**

**San Mateo, CA 94402**

**1-650-653-6000**

The San Mateo Marriott has provided a limited number of rooms for our group at the discounted rate of \$149 per night. Visit the Conference Website for more information.

[www.conference.cpcal.com](http://www.conference.cpcal.com)

**Limited number of rooms available on a first come, first served basis. ROOM BLOCK ENDS APRIL 12.**

This contemporary San Mateo hotel is located just 8 miles from San Francisco International Airport and welcomes guests with stylish, luxurious accommodations and warm, welcoming service. Featuring spacious guest rooms with plush beds and state-of-the-art amenities, distinctive event space, on-site dining, a well-equipped fitness center and more, our hotel provides everything you need to work and relax. Complimentary airport transportation is available from 5 a.m. to 9 p.m.

### FINANCIAL ASSISTANCE

We know that in this economic climate, some of you may not be able financially to participate in Conference XII.

The good news is the CP Cal Board has approved \$5,500 in Scholarships to be applied towards registration fees for Conference XIII on a first-come, first-served basis, as follows:

**First-time Attendee:** \$2,500 available (\$100 per individual for 25 first-timers). Be sure to check the box on the Registration Form.

**Needs-based:** \$3,000 available, to be allocated by the Scholarship Committee on a confidential basis. The Application Form is available here.

*For more details, contact:*

*Erin Keller at 415-399-8393, [erin@cpcal.com](mailto:erin@cpcal.com)*

*Christine Maderos at 925-566-8590, [christine@cpcal.com](mailto:christine@cpcal.com)*

### CONTINUING EDUCATION

Applications for legal and mental health credits are pending.



c/o 767 Brannan Place  
Concord, CA 94518  
Phone/Fax: 925-566-8590  
[www.cpcal.org](http://www.cpcal.org)

**Register Now!**

**[www.conference.cpcal.com](http://www.conference.cpcal.com)**