

Supporting the Team's Financial Neutral! Financial Specialist PART III of III

- People going through the trauma of divorce sometimes question the performance and integrity of their respective collaborative professionals. Financial professionals are uniquely vulnerable to being questioned, since they deal with “the money”, which is a frequently anticipated, but often grossly underestimated, minefield of emotional and intellectual complexities.
 - Money is an emotionally complex issue, often involving disparate value positions.
 - Money can be a complicated intellectual issue if the marital estate is complex.
 - Money can be a power issue.
- Don't underestimate the importance of the Financial Neutral! Support your Financial Neutral. Here's How:
 1. Hand out your Financial Neutral's one-sheet to clients to help them understand why the Financial Neutral is so much more time and cost efficient when retained at the beginning of a collaborative case.
 2. Collaborative team members should carefully, and perhaps repeatedly, explain the role of the Financial Neutral to clients; and in particular, that they are not involved to help or hurt one client, or one attorney, over another.
 3. Reinforce the Financial Neutral's role by always referring to him/her as the "neutral" versus as one of the “professionals”.
 4. Consider making the Financial Neutral the "Case Manager", the role will support her/his neutrality.
 5. Respect the neutrality of the Financial Neutral and keep communication open.
 - Discuss topics to be addressed at each team/client meeting with the Financial Neutral and collaborate in developing the agenda to be sent to clients prior to each meeting.
 - When serving as the Case Manager, the Financial Neutral should be the person to send out each agenda.
 6. At some point, the Financial Neutral might be perceived by one or both spouses as not being “neutral” when one spouse is aligned with the Financial Neutral or perceives that the Financial Neutral is aligned with the other spouse.
 - Attorneys *and* coaches should address this common mis-perception with clients early and often, before a problem arises! Consider saying to your client “Often the Financial Neutral gets perceived as not being neutral. If this happens in your case, do I have your permission to address this with you directly?”
 7. Volunteer to be the scribe when the Financial Neutral is facilitating the meeting (flip charts a plus!)

8. Share your observations about how your client processes financial data. Understanding how different personalities process data is key for our financial professionals.
 - For example, is your client more numbers oriented or picture oriented?
 - Help your Financial Neutral to understand your client's experiences with money and debt and how that informs the perspective of their financial future.
9. Advise your clients to provide everything the neutral requests to allow the Financial Neutral to provide detailed narrative report(s). If certain documents and/or information are not available, keep the Financial Neutral in the loop and ask how you can be of support in the gathering of all relevant information needed.
10. Help your client to remain open to potential financial options:
 - Explain that the Financial Neutral is in being utilized to present realistic options based on the data.
 - Prepare the higher earner for the likelihood of paying support.
 - Prepare the lower earner or unemployed spouse for the possibility that they may have to find a way to contribute financially.
11. Tell your Financial Neutral what you need from her/him; your perception of the financial issues in your case; and how you envision the process for that case.
12. Give your Financial Neutral feedback:
 - "Here's how I can help you be more effective in your role as a Financial Neutral."
13. Consider hosting a practice group meeting for the group's collaborative attorneys to outline what they need and want from the Financial Neutral; and the group's Financial Neutrals to outline their needs and wants from the collaborative team.
14. Remember to tell your Financial Neutral how helpful their work is; they appreciate it!

From the PEC:

Who cuts your hair? Do you tell them about what you do? What about your: chiropractor, massage therapist, physical therapist, yoga instructor, coach, etc?

If you have a good relationship with these wonderful people in the helping professions who are often the first to hear about an impending divorce, then now is the time to take your relationship to the next level and become referral partners.

It starts like this:

1. My clients who are in the midst of divorce could really use your services. Can I have a stack of cards and brochures so I can send them your way?

And progresses this way:

2. I wonder if you get a lot of people telling you about their impending break-ups. Yes? Well, here's a brochure about a class we teach about divorce. I promise we've had great feedback about the class and your client will thank you for the referral.

And then deepens this way:

3. Are you on Facebook? Let's be "friends." I'll be happy to share your posts about your business.

And then you start to form more relationships with more helpers like this:

4. Would your coworkers/colleagues/friends be interested in hearing from a divorce professional about what kinds of advice would be helpful for your clients who are going through breakups? Do you guys get together at a meeting or just a lunch? I'm happy to come if you think it would be helpful.