

## **TAMPA BAY ACADEMY OF COLLABORATIVE PROFESSIONALS FINANCIAL NEUTRAL MEMBERSHIP APPLICATION**

### **A. TBACP applicants from all professions must:**

- Have participated in at least three collaborative cases, including at least one as a team member. The other two may be as a team member or as an observer. The three cases may include pro-bono and modest means matters.
- Have successfully completed a minimum of one 2-day Basic Interdisciplinary Collaborative Family Law Training Program.
- Undergo an interview with the membership committee.
- Be sponsored by two (2) TBACP members, one of which must be a member of the applicant's profession and neither of which may share the applicant's employer.
- Hold membership in the International Academy of Collaborative professionals.
- Complete the standardized membership application for their profession.
- Complete at least (1) 30-hour approved mediation course, unless exempted by committee due to substantial experience.

### **B. TBACP financial neutral applicants must:**

- Hold a financial professional license or designation in good standing. A member must have the highest ethical standards in both their personal and professional lives.
- Have a minimum of five (5) years of practice experience working with marital and family law cases within one of the following professions:

Please select the financial disciplines in which you hold a Florida license.

- CFP –Certified Financial Planner and CDFA – Certified Divorce Financial Analyst
- CPA – Certified Public Accountant (
- CA – Chartered Accountant
- CMA – Certified Management Accountant (
- CGA – Certified General Accountant
- ChFC – Chartered Financial Consultant

- Document an aggregate of twenty hours (20) of continuing education in the financial fundamentals of divorce, giving the professional a basic understanding of family law, including:

Please select the applicable procedures below.

- 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
- ( ) Business valuation
- ( ) Forensic accounting

**C. Membership is selective.** Meeting all of the membership criteria does not guarantee an invitation to membership in TBACP. Membership is selective and involves a confidential, discretionary, and non-appealable process.

Please type or print clearly.

**I BASIC INFORMATION:**

Applicant Name:

Firm Name:

Address:

Phone:

Email:

Website:

What is your Florida license number or numbers? \_\_\_\_\_

When were you first licensed to practice in the State of Florida? Month \_\_\_\_\_ Year \_\_\_\_\_

Are you currently in good standing within your licensed discipline? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you a member of the International Academy of Collaborative Professionals? Yes \_\_\_\_\_ No \_\_\_\_\_

Approximately how much of your practice, in the preceding ten-year period, has been devoted to the area of Family Law?\_% If not 100%, please identify the other area(s) in which you practice and describe the make-up of your practice in the preceding ten-year period.

Have you had any prior disciplinary actions by the Florida Department of Business and Professional Regulation resulting in a finding of just cause? Yes \_\_\_\_\_ No \_\_\_\_\_. If yes, please state the year and describe.

\_\_\_\_\_

**II SPONSORS (TBACP MEMBERS):**

**Sponsor #1** Name:

Firm Name:

Address:

Phone:

Profession:

**Sponsor #2** Name:

Firm Name:

Address:

Phone:

Profession:

**III COLLABORATIVE LAW TRAINING (Please use additional sheet if needed for more training):**

Basic Training:

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

Additional Basic Training:

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

Intermediate and Advanced Training:

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

Additional Intermediate and Advanced Training:

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

**IV MEDIATION TRAINING (Please use additional sheet if needed for more training):**

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

Date: \_\_\_\_\_ # of Hours: \_\_\_\_\_

Place/Sponsoring Organization: \_\_\_\_\_

Instructor(s) \_\_\_\_\_

**V COLLABORATIVE EXPERIENCE:**

How many total collaborative law cases (i.e. with signed participation agreements) have you participated in during the last four years?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please provide details of three collaborative cases, with signed Participation Agreements, in which you have participated: *(Client names and case numbers redacted)*

**Collaborative Case #1**

Were you a financial neutral or were you an observer? \_\_\_\_\_  
Approximate date of commencement: \_\_\_\_\_ Approximate date of conclusion: \_\_\_\_\_  
Nature of the matter (i.e. divorce, post-judgment matter, etc): \_\_\_\_\_  
Names and roles of all other collaborative professionals or observers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Collaborative Case #2**

Were you a financial neutral or were you an observer? \_\_\_\_\_  
Approximate date of commencement: \_\_\_\_\_ Approximate date of conclusion: \_\_\_\_\_  
Nature of the matter (i.e. divorce, post-judgment matter, etc): \_\_\_\_\_  
Names and roles of all other collaborative professionals or observers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Collaborative Case #3**

Were you a financial neutral or were you an observer? \_\_\_\_\_  
Approximate date of commencement: \_\_\_\_\_ Approximate date of conclusion: \_\_\_\_\_  
Nature of the matter (i.e. divorce, post-judgment matter, etc): \_\_\_\_\_  
Names and roles of all other collaborative professionals or observers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VI MOTIVATION FOR APPLICATION:** *Use additional sheet if needed*

Why do you want to become a part of the Tampa Bay Academy of Collaborative Professionals?

**VII ACKNOWLEDGMENT:**

By making this application, you agree that if you become a TBACP member, you will:

- Adhere to TBACP practice protocols;
- Maintain continuous membership in the IACP;
- Timely pay all dues or other assessments within thirty (30) days of billing or other notification in writing;
- Maintain Florida Bar membership in good standing and notify the co-chairs in writing of any change;
- Notify the co-chairs in writing of any grievance proceedings which result in private or public reprimand, suspension or disbarment;
- Regularly attend general membership meetings, and may have no more than two unexcused absences per fiscal
- Participate in or observe at least one collaborative case (with a signed Participation Agreement) every two years;
- Document at least four days of continuing education in collaborative practice, conflict resolution or interest-based negotiations over every two-year period; and
- Provide annual or any other required reporting of compliance with all ongoing requirements for TBACP membership, recognize that the requirements may change from time to time, and agree to maintain up-to-date familiarity with these and all requirements listed on the Members section of the TBACP website.

By signing this application, you are representing that the above information is true and correct to the best of your knowledge. You also acknowledge that you are agreeing to all membership requirements and recognize that if you become a member of TBACP, select membership privileges or membership itself may be suspended upon failure to comply with all requirements of membership. You further acknowledge and represent that you agree to practice in accordance with the protocols established by the Tampa Bay Academy of Collaborative Professionals (as they may be amended from time to time).

SIGNED: \_\_\_\_\_ DATE: \_\_\_\_\_