



Advanced Collaborative Professional
APPLICATION

NAME:

ADDRESS:

TELEPHONE:

E-MAIL:

CATEGORY OF APPLICATION:

I am a

- Lawyer
- Family Professional
- Financial Professional

Please complete section **A**, **B** or **C**, as appropriate.
ALL applicants must complete Sections D, E, F and G.

SECTION A: TO BE COMPLETED BY LAWYERS

Law Society Membership Number:

Note: *Applicant's membership must be in good standing with the Law Society of Ontario, with no practice restrictions related to the practice of law.*

Training and Education:

Collaborative Training: *Required - a minimum of 5 full days of Approved Collaborative training which could include Level 1, Level 2 and Protocols training, of which there must be a minimum of 2 full days of interdisciplinary training.*

Specify Below Whether Training is Interdisciplinary	Primary Trainers	Date	Hours
			Total Hours:

Additional 40 hours of Approved Training or Education: *Required – must include:*

6 Hours: Advocacy in Collaborative Practice:

Trainers	Date	Hours
		Total Hours:

21 Hours: Domestic Violence / Intimate Partner Violence (DV) Training: *14 hours of approved training must be taken within 1 week; an additional 7 hours of training must pertain to collaborative process (CP) design and protocols to take into account Intimate Partner Violence and Power Imbalances. The CP component of the DV training must be done by an approved training team consisting of a Family Professional and CP Lawyer, both of whom are actively practicing in CP or as otherwise approved by the OCLF Board.*

DV training must be done within 2 years preceding this application. If completed more than two years ago, one day of approved DV training as a refresher course and a 7 hour day of approved CP DV protocols training is required.

Type of Training and Trainers	Date	Hours
		Total Hours:

Remaining 13 Hours comprising any approved courses within the following categories. Complete all that apply:

Additional Collaborative Training/Trainers	Date	Hours
		Total Hours:

Mediation Training/Trainers	Date	Hours
		Total Hours:

Advanced Interest Based Negotiation Training/Trainers	Date	Hours
		Total Hours:

Advanced Communication Skills/Trainers	Date	Hours
		Total Hours:

Family Dynamics or Relations Training/Trainers	Date	Hours
		Total Hours:

Impact of Separation on Children and Families/Trainers	Date	Hours
		Total Hours:

Trainers of an approved course may include up to 12 hours of training towards the required number of training hours.

SECTION B: TO BE COMPLETED BY FAMILY PROFESSIONALS

Regulatory Body:

Registration Number:

Note: Applicants must hold a license or professional accreditation and be a member in good standing of one of the following:

- *College of Psychologists of Ontario (CPO) - Registered Psychologist*
- *Ontario College of Social Workers (OCSWSSW)*
- *Canadian Association of Marriage and Family Therapy (CAMFT)*
- *The College of Registered Psychotherapists of Ontario*
- *Ontario Association of Consultants, Counsellors, Psychometrics and Psychotherapists (OACCPP)*
- *College of Physicians and Surgeons (CPSO)- Psychiatrist*

And must have:

*(a) (i) Masters level or MD degree in a related field; **and***

*(ii) Background, education and minimum **three** years clinical experience in:*

- *Family systems theory, which includes assessment and challenges of family dynamics in separation and divorce and challenges of restructuring families after separation*
- *Individual and family life cycle and development*
- *Assessment of individual and family strengths*
- *Expertise in child development, clinical experience with a specialty focus on children and an in-depth understanding of children's unique issues in divorce*
- *Understanding and awareness of race, culture, class, age, LGTBQ and gender*
- *Understanding and awareness of mental health and addictions*

OR

*(b) BSW degree, **and** background, education and minimum **ten** years clinical experience in:*

- *Family systems theory, which includes assessment and challenges of family dynamics in separation and divorce and challenges of restructuring families after separation*

- *Individual and family life cycle and development*
- *Assessment of individual and family strengths*
- *Expertise in child development, clinical experience with a specialty focus on children and an in-depth understanding of children’s unique issues in divorce*
- *Understanding and awareness of race, culture, class, age, LGTBQ and gender*
- *Understanding and awareness of mental health and addictions*

Training and Education:

Collaborative Training: *Required - a minimum of 5 full days of approved Collaborative training which could include Level 1, Level 2 and Protocols training, of which there must be a minimum of 2 full days of interdisciplinary training.*

Specify Below Whether Training is Interdisciplinary	Primary Trainers	Date	Hours
			Total Hours:

Additional 40 Hours of Approved Training or Education: *Required – must include:*

12 Hours: Approved Family Law Training or Education: *Family Professionals must have a basic understanding of the law in Ontario as it pertains to separating families with a focus on parenting issues*

Trainers	Date	Hours
		Total Hours:

21 Hours: Domestic Violence/Intimate Partner Violence (DV) Training: 14 hours of approved training must be taken within 1 week; an additional 7 hours of training must pertain to collaborative process (CP) design and protocols to take into account Intimate Partner Violence and Power Imbalances. The CP component of the DV training must be done by an approved training team consisting of a Family Professional and CP Lawyer, both of whom are actively practicing in CP or as otherwise approved by the OCLF Board.

DV training must be done within 2 years preceding this. If done more than two years ago, one day of approved DV training as a refresher course and a 7 hour day of approved CP DV protocols course is required.

Type of Training and Trainers	Date	Hours
		Total Hours:

Remaining 7 Hours comprising any approved courses in the following categories. Complete all that apply:

Additional Collaborative Training/Trainers	Date	Hours
		Total Hours:

Mediation Training/Trainers	Date	Hours
		Total Hours:

Advanced Interest Based Negotiation Training/Trainers	Date	Hours
		Total Hours:

Advanced Clinical Training/Trainers	Date	Hours
		Total Hours:

Trainers of an approved course may include up to 12 hours of training towards the required number of training hours.

SECTION C: TO BE COMPLETED BY FINANCIAL PROFESSIONALS

Regulatory Body:

Professional Designation:

Membership Number (if applicable):

Note: Applicants must hold a professional license or designation in good standing in one of the following:

- *CPA – Chartered Professional Accountant*
- *CA – Chartered Accountant*
- *CGA – Certified General Accountant*
- *CMA – Certified Management Accountant*
- *CFP – Certified Financial Planner*
- *Ch.F.C. - Chartered Financial Consultant*
- *CLU - Chartered Life Underwriter*
- *PFP - Personal Financial Planner*
- *CFDS – Chartered Financial Divorce Specialist*
- *CDFA - Certified Divorce Financial Analyst*
- *FCIA - Fellow of the Canadian Institute of Actuaries*
- *CBV - Chartered Business Valuator*

And, the ACP designation requires each candidate to demonstrate how their background, education and experience exceeds their professional association's designation's minimum requirements and exhibits in-depth broad-based financial knowledge, in addition to financial matters as they relate to separation and divorce including:

- *Financial aspects of divorce*
- *Cash management and spending plans*
- *Retirement and pension plans*
- *Income tax*
- *Risk management*
- *Individual and family financial planning concepts*
- *The emotional impact of separation and divorce on children and families*

Training and Education:

Collaborative Training: *Required - a minimum of 5 full days of approved Collaborative training which could include Level 1, Level 2 and Protocols training, of which there must be a minimum of 2 full days of interdisciplinary training.*

Specify Below Whether Training is Interdisciplinary	Primary Trainers	Date	Hours
Total Hours:			

Financial Aspects of Divorce: *Required - at least 5 full days of approved training in the financial aspects of divorce, giving the financial professional a basic understanding of family law in Ontario. Such education must include the following (Complete all that apply):*

Family Law Legislation in Ontario/Trainers	Date	Hours
Total Hours:		

Divorce Procedures and Process Options /Trainers	Date	Hours
Total Hours:		

Property – Valuation and Division/Trainers	Date	Hours
Total Hours:		

Pensions and RSP's – Valuation and Division/Trainers	Date	Hours
Total Hours:		

Cash Flow Management, including Budgeting/Trainers	Date	Hours
Total Hours:		

Child and Spousal Support/Trainers	Date	Hours
Total Hours:		

Canadian Financial Implications of Different Scenarios for Settlement, including analysis and future projections of net worth and cash flow/Trainers	Date	Hours
Total Hours:		

Canadian Income Tax Implications of various settlement options for property and support claims/Trainers	Date	Hours
Total Hours:		

Additional 40 Hours of Training or Education: *Required – in addition to the basic collaborative training and the training in the financial aspects of divorce. Must include:*

21 Hours of Domestic Violence/Intimate Partner Violence (DV) Training: *14 hours of approved training must be taken within 1 week; in addition, 7 hours of training must pertain to collaborative process (CP) design and protocols to take into account Intimate Partner Violence and Power Imbalances. The CP component of the DV training must be done by an approved training team consisting of a Family Professional and CP Lawyer, both who are actively practicing in CP or as otherwise approved by the OCLF Board.*

DV training must be done within 2 years preceding this application. If done more than two years ago, one day of approved DV training as a refresher course and a 7 hour day approved CP DV protocols course is required.

Type of Training and Trainers	Date	Hours
		Total Hours:

Remaining 19 Hours comprising any approved courses in the following categories.
Complete all that apply:

Additional Collaborative Training/Trainers	Date	Hours
Total Hours:		

Mediation Training/Trainers	Date	Hours
Total Hours:		

Advanced Interest Based Negotiation Training/Trainers	Date	Hours
Total Hours:		

Advanced Communication Skills/Trainers	Date	Hours
Total Hours:		

Family Dynamics Training/Trainers	Date	Hours
Total Hours:		

SECTION D: TO BE COMPLETED BY ALL APPLICANTS

Each applicant must have completed 8 collaborative files with signed participation agreements. These collaborative files must have been completed within five (5) years preceding this application. "Completed" means a final signed Agreement which fully or partially resolves the issues.

Please attach the cover page and signing page of each participation agreement, with clients' names blacked out.

Collaborative Professionals on File	Date File Completed

In the event that an applicant has not been involved in the minimum number of files in the preceding five (5) years, he or she may send a written submission to the ACP Committee explaining the circumstances. Upon review, the Committee may vary the minimum number of cases required for the designation.

SECTION E: TO BE COMPLETED BY ALL APPLICANTS

I agree to adhere to and comply with the Code of Conduct of my Professional Governing Body and to adopt and follow the IACP Standards and Ethics, as established from time to time.

Signature of Applicant

3. I have liability insurance in a minimum amount of \$1,000,000 either through my professional organization or third-party coverage. *Note: the OCLF does not audit or verify insurance coverage held by collaborative professionals. Professionals are solely responsible in the event of claims should the insurance coverage not apply to the professional's collaborative practice, or apply with limitations to coverage or for any other reason.*

4. I am subject to disciplinary measures by my governing professional body.

5. I confirm that the information in this application form is true and correct.

Signed by me on the _____ day of _____, 20_____.

Signature of Applicant

Please **mail** your completed application to: OCLF ACP Application
c/o Judith Huddart
Dranoff and Huddart
314 – 1033 Bay Street
Toronto, ON M5S 3A5

Or sign, scan and **e-mail** your completed application to: exec-dir@oclf.ca
(payment must be received before application is reviewed)

PLEASE NOTE THE FOLLOWING ADDITIONAL DISCRETIONARY PROVISIONS:

The ACP Committee may request an interview with an applicant as part of the admission process.

In the course of considering an application, the ACP Committee may:

- *Receive or request further information or submissions from an applicant;*
- *Decide when extensive experience and established credibility or other such evidence can substitute for some of the training and education requirements or for the prerequisite number of completed collaborative files;*
- *Request additional evidence demonstrating that licensing, educational and training requirements have been met.*

The ACP Committee reserves the right to refuse the designation to an applicant despite the fact that the applicant meets the technical requirements. In such situation, the Committee will offer the applicant an interview to discuss the application and the Committee's concerns.