MASSACHUSETTS
Collaborative Law Council

MONEY TALKS:

What Does it Say & What Does It Really Mean?

Come join us at the 2015 MCLC Forum!

Featuring:

Fred T. Baird, Keynote Speaker

"Show Me the Money, and I'll Show You the Impasse"

Beliefs about money can lead to changes in behavior, impasse in decision-making, and complications in the dispute resolution process. How can we as professionals recognize the challenges? How can we work through them in the dispute resolution process? This will be an interactive address where selected members of the audience will provide real life experiences to demonstrate the issues that will be addressed in the presentation.

Fred T. Baird is a principal of Aurora Financial Advisors, LLC, a financial advisory and wealth management firm with offices in Wellesley and Westford, Massachusetts.

and

Charles Styron, Psy. D., Plenary Speaker

"What's It Worth: When is Enough, Enough?"

How can our clients reach a resolution that they can live with? What does it mean to them or to us as their advisors for something to be "fair?" To be "just?" Or to be "free" for that matter? How is "worth" determined? What happens when one definition of worth collides with another? How do you determine your own professional worth? These are a few of the questions about value that most negotiations must address, and there are seldom perfect answers. How do we help all involved address these questions so that they can arrive at resolutions that are "good enough?"

Charles Styron, Psy. D. is a clinical psychologist in private practice, where he specializes in individual adult psychotherapy and neuropsychological assessment. He is a founding member of the Institute for Meditation and Psychotherapy located in Cambridge, Massachusetts, as well as the treasurer of the Boston Shambhala Center.

REGISTRATION INFORMATION:

Don't wait . . . Register Now! For registration, please go to www.MassCLC.org

Date: May 1, 2015

Location: Clark University Graduate School of Management, MetroWest Campus
333 Turnpike Road (Route 9)
Southborough, MA

Time: 8:30 a.m. – 5:00 p.m. (breakfast and lunch included)

MCLC Early Bird Member registration through March 31, 2015, $159.00; starting April 1, 2015, $195.00

Non-MCLC Members Early Bird registration through March 31, 2015, $195.00; starting April 1, 2015 $220.00

Cancellation Policy: Registration fees will be refunded less $40.00 for cancellations through April 24, 2015. After April 24, 2015 there will be no refunds.

Please note: Current MCLC members only are eligible for the member discount. Prospective members must apply to MCLC and be accepted before they will be eligible to register at the member rate. Program attendance counts toward the additional training requirement of the MCLC Membership Standards for Collaborative Practitioners. Continuing education credits are pending for Psychologists (APA) and Social Workers (ASWB).

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Workshops

Morning Session

Creating and Sustaining Cost Efficiencies and Containment in Collaborative Cases

Maura Sullivan, Esq.

As Collaborative Law has expanded and matured, we have found many challenges in blending the various business practices and expectations of multi-disciplinary teams. Our clients have expectations of cost-containment and efficiencies from us; similarly, we expect our clients to be cost-conscious and efficient. We will identify common stumbling blocks and offer strategies to anticipate and prevent theses challenges from derailing a team and a Collaborative case. Whether you are a new or experienced practitioner, attendees will take away concrete tools adaptable to their own practices to create and sustain cost-efficiencies and containment in their own cases.

Down the Money Rabbit Hole:
A Psychobiological Approach & Underground Meanings of Threat and Safety

Joy A. Dryer, Ph.D.

The meaning of money can be more threatening to clients than we sometimes imagine, in both civil and family law contexts. Clients' self-regulatory and defense patterns can reveal how threatened they feel. This workshop offers a psychobiological theory, teaching professionals how to detect self-regulatory arousal states and nonverbal responses to threat, as well as how to tailor appropriate safety measures.

Money: Fear and Greed in Collaborative Cases

Susan Miller, CPA, CFP, CDFA and Sanford M. Portnoy, Ph.D.

This workshop will focus on the tools and strategies the presenters have employed as a coach and financial neutral to help resolve Collaborative cases involving difficult financial issues. This workshop will give participants the opportunity to evaluate their own attitudes towards money, and will include role-plays, providing participants with tools to address financial issues in Collaborative cases, as well as offer insight into differing attitudes toward money.

Afternoon Session

A Collaborative Conversation about Child Support, Alimony & Unallocated Support

Jonathan R. Eaton, Esq., Frank J. Farley, and Justin L. Kelsey, Esq.

Through an overview of the differences between child support, alimony, and unallocated family support, as well as the use of role-play and sample case review, this workshop will demonstrate how the Collaborative process can encourage productive conversations regarding the issues that affect the calculation and use of these different types of support.

Prenups and Business Partnerships: Collaborating for Love and Money

Gina Arons, Psy.D., Jonathan Fields, Esq., Jeffrey Fink, Esq., Jessie Foster, CFP, CDFA, MBA, Susan Klebanoff, Esq. and Barbara Nason, Esq.

As professionals, we are often called on to help clients with intimate personal and professional situations at times when they are failing. Are there ways to prevent that? Creating a Collaborative process for prenups and partnership agreements will enable Collaborative professionals to move into new areas of practice and offer clients a valuable resource. This workshop explores ways to use Collaborative tools and skills in fresh and exciting ways to create relationships rather than dissolving them. Role-play examples of both a prenup and business partnership will be included.

Societal Expectations and Life Experiences Colliding in Monetary Negotiations

Lynn K. Cooper, Ed.D, Karen J. Levitt, Esq., and Emily A. Weber, Esq.

Societal expectations impact how we think- and how we expect others to think- about money. How do societal expectations and life experiences, which may be at odds, affect monetary negotiations with regard to the "big picture," but also the "potholes" along the way that may derail the Collaborative process?

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Presenters Bios

Fred T. Baird
Fred is a principal of Aurora Financial Advisors, LLC which has offices in Wellesley and Westford, Massachusetts. Fred coordinates the investment strategy and asset management responsibilities of the firm, and supervises the trading and operations functions within the company. Fred is a major contributor to the firm's written communications with clients and works with clients who have specialized needs in areas such as business valuation, succession planning, and non-financial asset management requirements. Prior to joining Aurora Financial Advisors, Fred was an international management consultant. Originally from New Zealand, Fred began his career as a Professor of Economics and Operations Research before becoming a management, economic and financial consultant for a series of international consulting firms.

Charles, Styron, Psy.D.
Charles is a clinical psychologist in private practice specializing in individual adult psychotherapy and neuropsychological assessment. He is also a longstanding practitioner of Tibetan Buddhist meditation and study, and he is a founding member of The Institute for Meditation and Psychotherapy located in Cambridge, Massachusetts, as well as its treasurer. Additionally, he is the treasurer of the Boston Shambhala Center, a former architect, and a former Nepal Peace Corps Volunteer. Charles is married to another clinical psychologist and is the father of a 19-year-old daughter. His extra-curricular interests include collage making, classical piano music, backpacking, investing, regular exercise, and NASCAR.

Gina Arons, Psy.D.
Gina is a licensed clinical psychologist with over 25 years of experience working with individuals, couples and families in Lincoln, Massachusetts. Dr. Arons is a Collaborative Law Coach, mediator, and consultant to attorneys and mediators. She serves on the board of MCLC, co-chairs the Advanced Training Committee and co-teaches for MCLC's Introductory Training. She has presented workshops internationally on topics related to Collaborative Law and mediation for IACP, MCLC, MCLE, MCFM, and multiple mental health organizations.

Lynn K. Cooper, Ed.D.
Lynn is a licensed and Board-Certified clinical psychologist, a divorce mediator certified by the Massachusetts Council on Family Mediation, and a collaborative coach, with an office in Newton, MA. She is a past President, Certification Committee chairperson, and current member of the Board of Directors of the Massachusetts Council on Family Mediation, and she is also a member of the Massachusetts Collaborative Law Council and the International Academy of Collaborative Professionals.

Joy A. Dryer, Ph.D.,
Joy wears three professional hats: Psychologist/ Psychoanalyst; Educator/ Adjunct Associate Professor; Mediator, Divorce Coach, and Trainer. She practices in New York City, plus now in Poughkeepsie, New York. As a divorce professional, Dr. Dryer is a member of the Hudson Valley Collaborative Divorce practice group, serving on the Executive Committee, and a member of the IACP's Research Committee. Her current trainings and research focus on a brain-mind- body approach to the separation process during divorce.

Jonathan R. Eaton, Esq.
Jonathan is a partner at Finn & Eaton, P.C. in Woburn and Saugus. Prior to becoming an attorney, he was a behavior therapist at the RCS Learning Center in Natick. Jonathan is a member of the Massachusetts Collaborative Law Council, International Academy of Collaborative Professionals, Massachusetts Council on Family Mediation, Massachusetts Bar Association, Essex County Bar Association, The Divorce Center, Rotary International, and is a member of the Town of Wilmington Finance Committee.

Frank Farley
Frank is the founder and principal of Divorce Planning Institute of New England since 2008. A trained divorce mediator, financial neutral and alternative dispute resolution professional in private practice, Frank works with clients to create equitable solutions. He is dedicated to the non- adversarial approach for resolving a dispute, and specializes in divorce financial matters and taxes, which provides an added value for divorcing clients.

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Jonathan E. Fields, Esq.
Jonathan, a founding partner of Fields and Dennis, LLP, has practiced law for over 25 years. An attorney, mediator and Collaborative lawyer, Jon is named in the 2015 Best Lawyers in America and 2014 Massachusetts Super Lawyers lists. He was President of MCFM, is a member of the Greater Boston Family Law Inn of Court, and sits on the Boards for the Massachusetts chapter of AFCC, and MCLC, where he serves on the Education Committee organizing introductory training.

Jeffrey Fink, Esq.
Jeffrey is a business and dispute resolution lawyer in Wellesley, Massachusetts. After graduating from the University of Pennsylvania and Columbia Law School, he spent many years as a large firm transactional business lawyer in New York before relocating to Massachusetts. He is active in a number of professional organizations including as Co-Chair of MCLC's Collaborative Business Law Practice Group and as Vice-Chair for Ethics of the ABA Dispute Resolution Section's Collaborative Law Committee.

Jessie Foster, CDFA ,CFP
Jessie Foster is a CFP®. CDFA™, Collaborative Law Financial Neutral and trained Mediator specializing in helping professionals and families navigate life's transitions such as retirement, job changes, divorce and widowhood. Jessie currently serves on the board of the Massachusetts Collaborative Law Council, and is a member of the Financial Planning Association and Massachusetts Council on Family Mediation. Jessie holds a M.B.A from Simmons College School of Management.

Justin L. Kelsey, Esq.
Justin is a Collaborative Divorce Attorney, Mediator, and managing partner for the Family Law Practice at Kelsey & Trask, P.C. in Framingham, Massachusetts. Justin is Clerk of the Massachusetts Collaborative Law Council, on the Board of Directors of the Massachusetts Council of Family Mediation, and on the Family Law Steering Committee of the Boston Bar Association. Justin, a presenter for the MCLC Introductory Training, has a decade of family law experience, and 5 years of mediation experience.

Susan Klebanoff, Esq.
Susan is an attorney and trained mediator with over 25 years of experience. She specializes in business and family law in Canton, Massachusetts. As a mediator and Collaborative attorney, Susan works with families facing complex financial and legal issues. Susan also continues to work with businesses on a wide range of legal issues. She is the Co-Chair of MCLC's Civil Committee and Practice Group, and a member of MCFM.

Karen J. Levitt, Esq.
Karen is the principal of the Levitt Law Group in Chelmsford, MA. She is a Collaborative Law attorney, mediator, litigator, guardian ad litem, and parenting coordinator. Karen is a founder and Past President of MCLC. She is on the Board of Directors of IACP, where she chairs the Access to Collaboration Task Force, and co-chairs a committee on training. She is a member of MCFM, and serves on the Massachusetts Trial Court Standing Committee on Dispute Resolution.

Susan Miller, MA, CPA, CFP, CDFA
Susan is the President of Aurora Financial Advisors in Wellesley, MA. She has provided tax, financial planning, and investment advice to individuals, and small business owners for over 25 years. Susan provides financial dispute resolution services in business and marital disputes. Susan is the 2014-15 MCLC President, and is a trained mediator, former IACP board member and trains financial professionals in the Collaborative Law process in Massachusetts, as well as in other states and internationally.

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Barbara L. Nason, Esq.
Barbara is a Collaborative attorney, mediator and arbitrator in Dedham, Massachusetts. Barbara founded Nason Divorce Solutions, LLC to assist clients with respectful resolutions to their disputes outside of court. She offers mediation, conciliation, arbitration, and special master services to clients and lawyers. She has presented at numerous continuing education programs. Barbara is Vice President of Education and Training for MCLC and serves on the Board. She is an active member of MCFM and IACP.

Sanford M. Portnoy, PhD.
Sanford is Director of the Center for the Study of Psychology and Divorce at Massachusetts School of Professional Psychology. For the past 20+ years he has researched, lectured, and trained others in interventions to help divorcing clients. He has published 25 articles in legal and psychological journals as well as a book to help lawyers work effectively with difficult clients, served as a coach/facilitator in numerous Collaborative cases, and trained Collaborative practitioners around the country.

Maura Sullivan, Esq.
An experienced legal generalist, Maura focuses her efforts on enhancing the quality of life for her clients. Governed by the twin core beliefs of empowerment and self-determination, Maura is committed to respectfully resolving disputes, often with people in crisis and under volatile circumstances. Whether in the role of advisor, consultant, counsel, mediator, conciliator or facilitator, Maura uses a balanced approach of objective analysis, while considering the interests of all stake-holders, to help create positive outcomes.

Emily A. Weber, Esq.
Emily is an attorney at the Levitt Law Group in Chelmsford, Massachusetts where she focuses her practice on all aspects of family law matters. Emily is a trained mediator, Collaborative Law practitioner, and litigator. She is actively involved in the Massachusetts Collaborative Law Council, serving as Co-Chair of the Tri-River Practice Group and Advanced Training Subcommittee. Emily, a graduate of Boston University School of Law, is also a member of MCFM and various other professional groups.