CDFA® Getting Started Checklist

As you enter into the divorce arena there are a number of issues that you will need to research regarding the divorce process in the states that you will be working in. Below is a “Getting Started Checklist” to help you begin the process.

☐ State Bar Association
  Website: __________________________________________________________
  Address: __________________________________________________________
  __________________________________________________________
  Phone: (_______) ________ - ____________

☐ Membership in Family Law Division
  • Can you become an Affiliate Member?
  • How do you join?

☐ Continuing Legal Education
  Website(s): _______________________________________________________
  Contact: __________________________________________________________
  Upcoming Family Law Classes: ____________________________________
  ________________________________________________________________

☐ Divorce/Family Law Mediation Groups/Associations
  Website(s): _______________________________________________________
  Contact: __________________________________________________________
  Upcoming Meeting/Training Dates: _________________________________
  ________________________________________________________________

☐ Collaborative Law Associations
  Website(s): _______________________________________________________
  Contact: __________________________________________________________
  Upcoming Meeting/Training Dates: _________________________________
  ________________________________________________________________
Divorce Support Groups

Website(s): ____________________________________________________________
Contact: ________________________________________________________________
Upcoming Meeting Dates: ________________________________________________

Local Law Libraries

Location: ________________________________________________________________
Resources Available: ______________________________________________________

Develop a Lawyer Referral List

List a minimum of three (3) family law lawyers
(1) _________________________________________________________________
(2) _________________________________________________________________
(3) _________________________________________________________________

Develop a Mediator Referral List

List a minimum of three (3) family law mediators.
(1) _________________________________________________________________
(2) _________________________________________________________________
(3) _________________________________________________________________

Develop a Collaborative Law Referral List

List a minimum of three (3) contacts in each area of specialization.
(i.e., attorneys, accountants, therapists, and social workers).
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Obtain Federal and State Withholding and Income Tax Tables

• Federal Withholding Tables can be found in IRS Publication 15 (Publication 15-T for 2018), Circular E. This is available on the IRS website www.irs.gov or at your local IRS office.

• Most State Tax Tables can also be found on the State’s website or at your State’s local Revenue or Treasury Office.
☐ Obtain FICA and Medicare Tax Rates
   - These can be found on the Social Security Administration’s website www.ssa.gov.

☐ Obtain Voluntary Retirement Plan Contribution Limits
   - 401(k)
   - IRA
   - Roth IRA
   - SEP
   - SEP IRA
   - Defined Contribution Plan
   - 403(b)
   - 457
   - Non-Qualified Plan

☐ Obtain Copies of Retirement Plan Handbooks and Plan Documents Of Major Employers in Your Area
   - Highly Compensated Plans
   - Executive Plans
   - General Employee Plans
   - Union Plans

State-Specific Statutes or General Practice

☐ Waiting Periods
   Minimum residency requirements of one spouse to be eligible to file for divorce in your state(s):
________________________________________________________________________________

   Cooling-Off Period: _______________________________________________________________
   (minimum period from date of filing to date of divorce)

☐ FAULT: What Role Does It Play In:
   Division of Property: _______________________________________________________________
   Award of Custody: _________________________________________________________________
   Spousal Support: _________________________________________________________________
   Child Support: _________________________________________________________________

☐ Child Support
   - What are the guidelines for determining child support in your state(s)?
   - Do the guidelines vary by county, judge, court jurisdiction or geographic area? If so, which guidelines apply in which situation?
   - Is there software available with the required formula(s)? If so, how do you obtain the software and what is the cost?
☐ Spousal Support
- Are there guidelines for determining spousal support in your state(s)?
- Do the guidelines vary by county, judge, court jurisdiction or geographical area? If so, which guidelines apply in what situation?
- Is there software available with the required formula(s)? If so, how do you obtain the software and what is the cost?

☐ Mediation
- Is mediation utilized and/or required in your state(s)?
- If yes, what are the requirements related to mediation?
- How do you become a certified family law mediator in your state(s)?
- Obtain a list of divorce mediators in your state(s) as potential prospects for your services.

☐ Arbitration
- Is arbitration utilized and/or required in your state(s)?
- If yes, what are the requirements related to arbitration?
- How do you become a certified divorce arbitrator in your state(s)?
- Obtain a list of divorce arbitrators in your state(s) as potential prospects for your services.

☐ Collaborative Law
- Is collaborative law utilized in your state(s)?
- If yes, what are the requirements related to collaborative law?
- How do you become certified to participate in collaborative law as a financial specialist in your state(s)?
- Obtain a list of collaborative divorce lawyers in your state(s) as potential prospects for your services.
CDFA® Marketing Plan

☐ Identify your target market (e.g., men, women, lawyers, mediators, etc.).

☐ Set weekly, monthly, and yearly goals (e.g., how many prospects contacted, how many seminars given, how many new clients, how much revenue generated, etc.).

☐ Develop an “elevator speech” (a sentence or two describing exactly how you can help clients and/or lawyers during the divorce process).

☐ Develop a curriculum vitae.

☐ Have a professional photo taken: a head-and-shoulders picture saved as a high-resolution (300 dpi) .jpg file for printing, and a low-resolution (72 dpi) .jpg for the web.

☐ Post your photo and short biography on the IDFA website.

☐ Create dedicated business cards and a website for your divorce practice.

☐ Develop a marketing mailing and phone list.
  - Local attorneys
  - Local mediators
  - Local arbitrators
  - Local collaborative professionals
  - Divorce support groups
  - Divorce and family law legal associations
  - Accountants
  - Family and marital therapists

☐ Develop a marketing letter for each group listed above.

☐ Develop a phone marketing script for each group listed above.

☐ Develop seminars or order IDFA Presentation Kits to enable you to hold seminars for divorce support groups and legal professionals.

☐ Develop or order IDFA brochures promoting your new practice.

☐ Offer copies of The IDFA Divorce Survival Guide to potential clients.

☐ Attend IDFA conferences and network with other CDFA professionals.