

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.