COASTAL
FAMILY LAW AND MEDIATION

# Welcome to Coastal Family Law & Mediation

*Your Road Map to a Positive Transition*

Thank you for considering Coastal Family Law & Mediation LLP for your family mediation. Our mission is to help families navigate the legally and emotionally complex process of family restructuring—so you can build a positive future for yourself and your family.

Below is a road map of what to expect when working with us.

## Our Commitment to You

At Coastal Family Law & Mediation LLP, we are committed to:

✓ Understanding your personal and financial goals, along with your unique family situation.

✓ Developing tailored options for your situation.

✓ Reducing the stress of the traditional legal process.

✓ Explaining complex legal concepts in clear, understandable terms.

✓ Providing you with a clear record of each session's outcomes.

✓ Supporting you through every step of the mediation process.

We understand that separation creates a whole host of challenges—financial, practical, and emotional. Our approach is to guide you through this process with care, expertise, and efficiency. We'll provide a clear roadmap and offer supportive, judgment-free guidance at every step.

**We believe that a good agreement is a durable one—**one that works today and five years from now. Separations are turning points, and we want to help you make yours a positive one.

# The Mediation Process at a Glance

*Six clear phases to guide your journey*

We have organized the mediation process into six main phases. Each phase has a clear purpose, timeline, and defined responsibilities—so you always know what to expect and what comes next.

| # | Phase | What Happens |
|---|---|---|
| 1 | **Intake & Engagement** | We get to know you, your goals, and your family situation. |
| 2 | **Information Gathering** | We collect detailed financial and family information. |
| 3 | **Mediation Sessions** | We work together toward resolution on all key issues. |
| 4 | **Draft Agreement** | You receive a draft agreement for review and legal advice. |
| 5 | **Signing** | Both parties sign the finalized separation agreement. |
| 6 | **Plan Implementation** | We guide you through putting the agreement into action. |

# Benefits of Mediation

### 1. Forward-Focused

Mediation emphasizes solutions and future arrangements rather than dwelling on past conflicts. This approach helps families move beyond blame and resentment, encouraging constructive dialogue about what will work best going forward.

### 2. Supports Family Harmony

The mediation process fosters respectful communication and collaboration, reducing hostility and misunderstandings. By working together to resolve issues, families can preserve important relationships—especially when ongoing co-parenting is required.

### 3. Keeps You in Control

Unlike court proceedings where a judge imposes decisions, mediation empowers you to make your own choices about parenting, finances, and property. This autonomy ensures that outcomes are tailored to your family's unique circumstances and priorities.

### 4. Provides Long-Term Stability

Mediation encourages the creation of clear, mutually acceptable agreements that address both immediate and future needs. Well-structured arrangements reduce the likelihood of future disputes and provide a stable foundation for post-separation life.

### 5. Creates Durable Agreements

Agreements reached through mediation tend to be more durable because they are crafted collaboratively and reflect the genuine interests of all parties. When everyone has a voice, there is greater buy-in and compliance.

### 6. Peace of Mind

Mediation offers a confidential, supportive setting where difficult conversations can take place safely. Knowing that you have contributed to fair and workable solutions can alleviate anxiety and uncertainty, allowing you to focus on healing and rebuilding.

> *Mediation is a valuable process. It provides the best opportunity to minimize disruption for your family, craft agreements that work for you, and build a future you can be proud of. It's not always an easy process—in fact, you can think of it as a forum to have the hard conversations—but it is an investment in your family's future.*

# Detailed Overview of the Mediation Process

## Phase 1: Intake & Engagement

**Purpose:** To establish our relationship and gain an understanding of your goals for the future and the mediation process.

During this phase, we'll have a pre-mediation meeting together. This session is designed to:

– Get to know you and learn about what you hope for the future and what "keeps you up at night" about your separation.

– Answer your questions about the mediation process and provide advice on how to succeed.

– Screen for family violence (which we are required to do by law).

– Review the Agreement to Mediate.

At the end of the meeting, our goal is for you to feel supported and better prepared for the mediation ahead. This meeting is in person and we will review the documents you'll need to gather.

Because we are committed to providing each client with compassionate and competent services, we carefully manage the number of mediation files we have at any given time. We will work with you to ensure you can commit to our recommended timeline, including ensuring you have all the documents you need.

⏱ **Timing:** Within the next 14 days

This may seem short, but it ensures you receive our full attention and personalized service. Your completion of our intake process signals your readiness to proceed. If you find that you need more time or aren't quite ready, please let us know—we'll be here for you when the time is right.

If we don't hear from you within a week, we may need to offer your spot to another client who is ready to move forward. This approach allows us to serve all of our clients efficiently while ensuring everyone receives the focused attention they deserve.

| What You Need to Do | What We Will Do |
|---|---|
| ✓ Complete the intake form with high-level financial and family information (estimated time: 45 minutes).<br>✓ Attend the pre-mediation meeting ready to discuss your goals and ask questions.<br>✓ Review and e-sign the Agreement to Mediate.<br>✓ Make your initial payment. | ✓ Learn about your goals and priorities.<br>✓ Answer all of your questions about the mediation process.<br>✓ Engage you as a client of our firm.<br>✓ Provide you with this overview of the mediation process and what to expect. |

## Phase 2: Information Gathering

**Purpose:** To collect comprehensive information about your finances, belongings, family dynamics, and mediation objectives in more detail.

This comprehensive data collection helps us understand your unique situation and prepare the required documents for mediation. We will book your mediation session once we have all the necessary documents.

Once we have all the required information from both parties, we will provide you with:

– A draft Property & Debt Schedule showing you and your spouse's assets and the values assigned to each one.

– A support calculation outlining child and spousal support, as applicable.

These documents are circulated for information purposes for you to review prior to the mediation.

⏱ **Timing:** Within 2 weeks of your initial consultation

| What You Need to Do | What We Will Do |
|---|---|
| ✓ Provide the documents on the checklist within 1 week of receipt (complete it as best you can—we'll discuss outstanding items in our scheduled phone meeting).<br>✓ Promptly follow up on any action items from the phone meeting. | ✓ Provide you with a comprehensive questionnaire and document checklist.<br>✓ Review all information and documents and identify anything missing or incomplete.<br>✓ Prepare and circulate support calculations.<br>✓ Prepare and circulate the Property & Debt Overview. |

## Phase 3: Mediation

**Purpose:** To begin the process of reaching agreements on the agenda items that will form your separation agreement.

Two days prior to the mediation, we will circulate an agenda, which we'll review together at the start of the day.

Unless we agree otherwise, mediation will start at 10:00 AM, include a 30-minute lunch break, and conclude at 3:30 PM. If more time is needed (and it often is), we can agree to extend the day or book a follow-up session.

We typically work through the following subject areas:

- Housekeeping and ground rules
- Goals and interests
- Parenting (if you have minor children)
- Child support (if applicable)
- Spousal support (if applicable)
- Property division
- Other matters specific to your family

As tentative agreements are reached, I will document them as we go so you have a record of what has been discussed. I will typically have the parties alternate proposals and offer options and ideas that may work for your family.

> **A note about legal advice:** *While I am a lawyer, in my role as mediator I cannot give specific recommendations for what you "should" do. You get to be in the driver's seat to decide what works best for your family.*

Our mediation package includes up to 10 hours of mediation session time, and it can be split up in a way that best serves your family.

⏱ **Timing:** Typically within 3 weeks after all information has been received

| What You Need to Do | What We Will Do |
|---|---|
| ✓ Come to the mediation prepared to discuss matters and make proposals. | ✓ Circulate the agenda 2 days prior.<br>✓ Pre-prepare a draft agreement template to record tentative agreements and proposals.<br>✓ Prepare a plain-language summary of your mediation session. |

## Phase 4: Draft Agreement

**Purpose:** To review your draft agreement, make any necessary adjustments, and ensure it accurately reflects your wishes.

I will circulate the draft agreement within 2 weeks of the session. After each party has had a chance to get independent legal advice, I ask that you email me (copying the other spouse) with any requested changes.

Once I hear from both of you about your respective change requests, I will either update the agreement for minor or agreed-upon changes, or schedule a follow-up session to work through any unresolved items together.

⏱ **Timing:** Draft circulated within 1–2 weeks of completing mediation

| What You Need to Do | What We Will Do |
|---|---|
| ✓ Review the draft agreement (ideally with a lawyer of your choice, though having a lawyer is not mandatory).<br>✓ Note any questions, concerns, or desired changes.<br>✓ Email the mediator and copy your former spouse with requested changes. | ✓ Send you draft documents for review.<br>✓ Review change requests from both parties.<br>✓ Update the agreement and re-circulate, or hold a follow-up mediation to address concerns.<br>✓ Prepare final versions of the agreement for signing. |

## Phase 5: Signing

**Purpose:** To formally execute your Separation Agreement so that it is legally valid and binding.

Once you're completely satisfied with the agreement, you and your spouse will each sign it with an adult witness who is not your former spouse, and return the signed copy to our office.

⏱ **Timing:** We encourage you to return signed agreements within 2 weeks of the final draft

| What You Need to Do | What We Will Do |
| --- | --- |
| ✓ Sign the agreement with an adult witness (not your former spouse).<br>✓ Return the signed copy to our office. | ✓ Store an electronic copy of your agreement during the limitation period. |

## Phase 6: Plan Implementation

**Purpose:** To ensure your Separation Agreement is properly implemented and to provide guidance on maintaining its effectiveness.

After we receive a copy of the signed agreement, we'll provide you with clear instructions on how to put your plan into action. This may include transferring assets, updating beneficiary designations, and informing key people about their roles in your plan.

⏱ **Timing:** Begins immediately after signing and is ongoing

| What You Need to Do | What We Will Do |
| --- | --- |
| ✓ Follow our instructions for re-titling assets and updating beneficiary designations.<br>✓ Store your original documents in a safe place and inform a trusted party of their location. | ✓ Provide detailed instructions for implementing your Separation Agreement. |

## Your Next Steps

We will be meeting to discuss your file and goals and if the mediation package is a good fit for you – we will begin that process – which includes signing the agreement to mediate and paying your retainer.