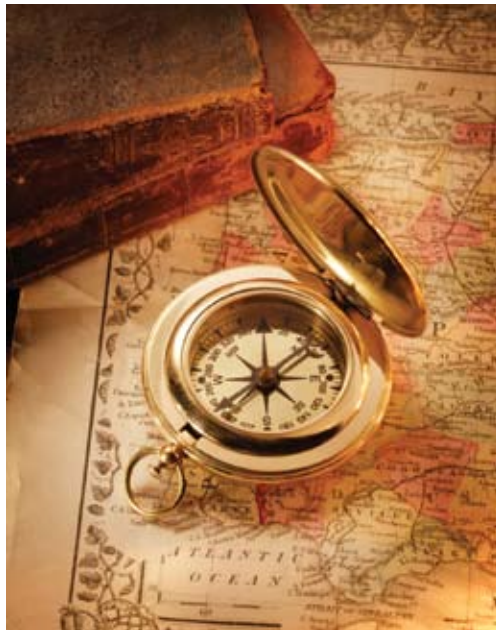




4TH ANNUAL
COLLABORATIVE LAW
SPRING RETREAT

Earn up to 13.25 Hours of MCLE Credit Including 2.00 Hours of Ethics Credit
CFP, CPA, LMFT, LPC, and LSW Continuing Education Credit Available



Explore Collaborative Law!

March 7*, 8-9, 2007

Hyatt Regency on Town Lake • Austin, Texas

*Optional Wednesday Workshop: How to Build Your Collaborative Practice

Members of the Collaborative Law Institute of Texas receive a \$100 registration discount.



4TH ANNUAL COLLABORATIVE LAW SPRING RETREAT

March 7*, 8-9, 2007 • Hyatt Regency on Town Lake • Austin, TX

Earn up to 13.25 Hours Credit Including 2.00 Hours of Ethics Credit

Course Director: Kristen A. Algert, J.D., Austin, TX Assistant Course Director: Scott D. Clarke, CFP, CDFA, Bedford, TX

*WEDNESDAY, MARCH 7, 2007

Optional pre-retreat workshop—please select on registration form (additional registration fee). Register early; limited to 50 registrants.

9:30 a.m.-4:30 p.m.*

How to Build Your Collaborative Practice

Designed for practitioners who have limited time and resources for marketing, this one-day workshop will offer specific strategies for starting and building a successful collaborative law practice. You will:

Learn how professionals in North America and the UK have successfully built collaborative law practices.

Discover the four essential components for building a collaborative law practice.

Identify why clients choose collaborative law.

Effectively define and communicate your collaborative law message.

Identify your ideal referral source and client.

Create an action plan for growing a collaborative law practice.

About the Presenter:

Liz Ferris of Ferris Consulting, specializes in assisting collaborative law professionals and groups who want to create and execute results-oriented marketing plans to expand the public's interest in collaborative law. Since 2001, Ms. Ferris has helped hundreds of collaborative professionals implement strategies for building a successful collaborative practice. She helped design and implement a nationwide marketing campaign for the International Academy of Collaborative Professionals (IACP), and has facilitated retreats across North America and the UK.

*Workshop includes lunch and breaks.

THURSDAY MORNING, MARCH 8, 2007

8:00 a.m. Registration Opens

Includes continental breakfast.

8:45 a.m. Welcome and Announcements

9:00 a.m. .50 hr including .17 hr ethics

Leadership and Renewal

The adventure has just begun! Join the expedition to find the Holy Grail—Joy in your Collaborative Practice.

Jennifer Tull, J.D., Austin, TX

9:30 a.m. .50 hr including .17 hr ethics

Lead from Behind

Discover the value that professionals bring to the collaborative process when they stop trying to control the outcome. Lawyers, venture outside of your comfort zone and into the wild world of possibilities with the help of allied professionals.

Hon. Patrice McDonald, Conroe, TX

10:00 a.m. Break

10:15 a.m. 1.75 hr including .25 hr ethics

Navigate the Competitive and Cooperative Elements of Negotiation: An Interactive Negotiation Exercise

Experience the thrill of working with a team to successfully and skillfully navigate the sometimes turbulent waters of negotiation.

Collaborative Law Spring Retreat Planning Committee

12:00 p.m. Networking Lunch

Included in registration

THURSDAY AFTERNOON

1:15 p.m. 1.25 hr

Enrich the Clients' Journey; Add Value with Client Education

Learn from allied professionals how to offer clients more than a divorce through the collaborative process. Find out how to maximize the clients' experience with education.

Scott D. Clarke, CFP, CDFA, Bedford, TX
Mark R. Otis, Ph.D., Dallas, TX

2:30 p.m. .50 hr including .17 hr ethics

Blaze the Trail (But Take More than a Machete)

Unearth ways to keep yourself out of trouble in uncharted territory. Learn to outfit yourself and your office with the right protective gear.

Angela G. Pence, J.D., Houston, TX

3:00 p.m. Break

3:15 p.m. .50 hr

Search for Hidden Treasure: the Psychology of Money

Why in the world are they arguing over airline miles? Take a trek through the tangled-up jungle of clients' emotions about money and stuff.

David Brunson, CFP, CFA, CDFA, Plano, TX

3:45 p.m. .50 hr

Know Before You Go; Pay Attention to Travel Advisories

Why do some collaborative cases detour to litigation? Excavate the ruins for root causes of unsuccessful collaborative cases. A prepared and knowledgeable explorer is a successful explorer.

Richard C. Price, J.D., Fort Worth, TX

4:15 p.m. 1.00 hr including .25 hr ethics

Share the Adventure: Case Autopsy One

Take a walkabout into a real collaborative case guided by the authentic native collaborative team. Get the inside story of what worked and what didn't work.

Scott D. Clarke, CFP, CDFA, Bedford, TX
Steven E. "Jake" Jacobson, MSSW, LCSW, Denton, TX
Darcy E. Loveless, J.D., Denton, TX
Camille Milner, J.D., Denton, TX

5:15 p.m. Adjourn to reception

FRIDAY, MARCH 9, 2007

8:00 a.m.

Catch the Worm!

As in "the early bird catches the worm," rise and shine, for the optional early morning break-out meetings with members of your profession. Join your colleagues for continental breakfast and to discuss collaborative topics of specific interest to you. Also, be the first to hear about two, new CLI-TX member benefits!

9:00 a.m. .75 hr including .17 hr ethics

Pack a Flashlight and Venture Into the Shadows

Each case presents uncharted territory—unseen advisors, "shadow proxies," hidden agendas, unspoken wants and needs—all are part of the process. Learn to sniff out and tame what lurks in the shadows and behind the scenes.

Janice L. Green, J.D., Austin, TX

9:45 a.m. 1.00 hr including .17 hr ethics

Find New Routes Through Familiar Territory—Creative Settlement Options for Children's Issues

The collaborative process encourages divorcing parents to find unique solutions for their families. Experienced guides reveal unique substantive solutions to child-related issues.

Larry Hance, J.D., Dallas, TX
Honey A. Scheff, Ph.D., Dallas, TX

10:45 a.m. Break

11:00 a.m. 1.00 hr including .17 hr ethics

Find New Routes Through Familiar Territory—Creative Settlement Options for Property Issues

As with children's issues, the collaborative process allows clients to explore and create unique solutions for meeting their financial needs and allocating the marital estate. Survey the financial professional's tool kit and find creative, substantive solutions to formidable property-related issues.

Tracy B. Stewart, CPA, CFP, CDFA, Austin and Bryan, TX

Jacqueline Taylor, J.D., Houston, TX

12:00 p.m. Pick Up Box Lunch

Included in registration.

12:15 p.m. 1.50 hr including .25 hr ethics

Meet New People, Learn New Things: Round Table Discussion

Investigate how those outside of your sphere handle various collaborative issues. Immerse yourself in various substantive issues with people who hail from other cities, other backgrounds, and other professions.

Deborah Slye Miller, J.D., Dallas, TX

1:45 p.m. Break

2:00 p.m. 1.00 hr including .25 hr ethics

Follow in the Footsteps of the Masters: Case Autopsy Two

Does it sometimes seem everyone else was given a map, while you struggle through the maze without a clue? Let master collaborators show you the way.

David Brunson, CFP, CFA, CDFA, Plano, TX
Kevin Fuller, J.D., Dallas, TX
Linda Solomon, LPC, LMFT, LCDC, Dallas, TX

3:00 p.m. General Session Adjourns

3:15 p.m. 1.50 hr

For Those Who Want More...

An optional, post-conference "fireside chat" for anyone who wants more of the collaborative experience. This is the place to discuss your ideas for improving the process, find out more about CLI-TX, ask questions about marketing, talk about practice groups and mentoring, and get information on just about any topic related to the collaborative process.

4:45 p.m. Adjourn

REGISTRATION FOR CB07

Mail this registration form to:

The University of Texas School of Law, Attn. CB07
P.O. Box 7759, Austin, TX 78713-7759 or fax a copy to: (512) 475-6876

PLEASE PRINT CLEARLY

Bar Card# _____ TX Other State: _____ N/A

Occupation Lawyer Mental Health Professional Financial Professional

Other _____

Name [Mr. / Ms.] _____

Firm _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Registrant's Email (required) _____

REGISTRATION

Includes Course Binder, Reception, Thurs/Fri Continental Breakfast and Lunch

*Members of the Collaborative Law Institute of Texas receive a \$100 registration discount. To join the Collaborative Law Institute of Texas, please call 972-386-0158.

Optional Wed. March 7 Session—Limited to 50 Registrants..... \$225.00
How to Build Your Collaborative Practice

CONFERENCE REGISTRATION: CLI-TX MEMBERS*:

Early Registration Fee due by Wed. Feb. 28, 2007..... \$350.00
Registration Fee after Wed. Feb. 28, 2007 \$400.00

CONFERENCE REGISTRATION: NON-MEMBERS:

Early Registration Fee due by Wed. Feb. 28, 2007..... \$450.00
Registration Fee after Wed. Feb. 28, 2007 \$500.00

CONFERENCE PUBLICATIONS AND MEDIA

Allow 2-4 weeks from conference date for delivery.

Course Binder WITHOUT Conference Registration \$100.00
Audio CD Set \$125.00

METHOD OF PAYMENT

TOTAL ENCLOSED \$_____

Check (make checks payable to: The University of Texas at Austin)
VISA or Mastercard (sorry, no AMEX or Discover)

Card # [] [] [] [] - [] [] [] [] - [] [] [] [] - [] [] [] []

X _____
Authorized Signature

[] [] / [] []
Exp. Date (mm/yy)

Spring Retreat Scholarships

The CLI-TX Spring Retreat Planning Committee has established a scholarship program for the 2007 Spring Retreat. Spring Retreat scholarships include Spring Retreat registration fees only (optional workshop not included). Scholarship recipients will be responsible for funding their own travel, lodging, meals, and all other related expenses. Anyone may apply for a scholarship—regardless of profession—although preference will be given to CLI-TX members.

Scholarship applications are available on the CLI-TX website at: www.collablawtexas.org. Deadline for applications is 12:00 noon CST on February 15, 2007. All decisions regarding scholarships will be made at the sole discretion of the Spring Retreat Scholarship Committee.

AUSTIN

March 7*, 8-9, 2007

CONFERENCE LOCATION



Hyatt Regency on Town Lake

208 Barton Springs
Austin, Texas 78704
512-477-1234

Special rate \$169
good through February 14, 2007
(subject to availability)

Parking: \$5 self-parking;
(subject to change)

KEY DATES

Registration & Cancellation

February 28, 2007-5 p.m.

last day for early registration

add \$50 for registrations
received after this time

March 2, 2007-5 p.m.

last day for full refund

March 5, 2007-5 p.m.

last day for partial refunds

\$50 processing fee applied

March 7, 2007-9:30 a.m.

optional workshop begins

March 8, 2007-9 a.m.

conference begins

**M
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E**

This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 13.25 hours, of which 2.00 credit hours will apply to legal ethics/professional responsibility credit.

CONFERENCE FACULTY

DAVID BRUNSON, CFP, CFA, CDFA
Lifeway Financial Corporation
Plano, TX

SCOTT D. CLARKE, CFP, CDFA
Clarke Divorce Financial
Consultants, LLC
Bedford, TX

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Koons, Fuller, VandenEykel
& Robertson, P.C.
Dallas, TX

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Farris & Green
Austin, TX

LARRY HANCE, J.D.
Hance & Wickham, P.C.
Dallas, TX

STEVEN E. "JAKE" JACOBSON,
MSSW, LCSW
CCD Counseling
Denton, TX

DARCY E. LOVELESS, J.D.
Loveless & Loveless
Denton, TX

HON. PATRICE MCDONALD
Conroe, TX

DEBORAH SLYE MILLER, J.D.
Deborah Slye Miller, P.C.
Dallas, TX

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**Crockett, McBride & Associates @
Merrill Lynch Global Private Clients**

**Dallas Alliance of Collaborative
Professionals**

**Koons, Fuller, VandenEykel &
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Tindall & Foster P.C.

Collaborative Divorce Professionals Alliance (Austin)

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McClure Duffee & Eitzen L.L.P.

McCurley, Orsinger, McCurley, Nelson & Downing, L.L.P.

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E-mail us at

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or call us at

512-475-6700

for more information

4TH ANNUAL COLLABORATIVE LAW SPRING RETREAT

March 7*, 8-9, 2007

Hyatt Regency on Town Lake • Austin, Texas

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U.S. Postage Paid
The University of
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School of Law