

**4<sup>th</sup> Annual Collaborative Law Spring Retreat**  
**March 7\*, 8-9, 2007 • Hyatt Regency Austin • Austin, TX**

**Wednesday Morning, Mar. 7, 2007**

9:30 am  
1.00 hr

**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.

Liz Ferris, Ferris Consulting - Milwaukee, WI

**Thursday Morning, Mar. 8, 2007**

8:00 am

**Registration opens**

9:00 am  
0.50 hr  
0.17 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, Law Offices of Jennifer Tull - Austin, TX

9:30 am  
0.50 hr  
0.17 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.

John P. Anderson, John P. Anderson, CPA - Austin, TX  
Keith D. Maples, Noelke English Maples St. Leger LLP - Austin, TX  
Hon. Patrice McDonald, County Court at Law 3 - Conroe, TX  
Syd Sharples, Nicholls & Associates - Austin, TX

10:00 am	<b>Break</b> Break
10:15 am 1.75 hrs	<b>Navigate the Competitive and Cooperative Elements of Negotiation: An Interactive Negotiation Exercise</b>  Experience the thrill of working with a team to successfully and skillfully navigate the sometimes turbulent waters of negotiation.

## Thursday Afternoon, Mar. 8, 2007

12:00 pm	<b>Networking Lunch</b> <b>Included in registration</b>  <b>Networking Lunch</b> <b>Included in registration</b>
1:15 pm 1.25 hrs	<b>Enrich the Clients' Journey; Add Value with Client Education</b>  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, Clarke Divorce Financial Consultants LLC - Bedford, TX Mark R. Otis, Independent Practice - Dallas, TX
2:30 pm 0.50 hr	<b>Blaze the Trail (But Take More than a Machete)</b>  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 England, Tindall & England, PC - Houston, TX
3:00 pm	<b>Break</b> Break
3:15 pm 0.50 hr	<b>Search for Hidden Treasure: the Psychology of Money</b>  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, Lifeway Financial Corporation - Plano, TX
3:45 pm 0.50 hr	<b>Know Before You Go; Pay Attention to Travel Advisories</b>  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, The Price Law Firm - Fort Worth, TX

<p>4:15 pm 1.00 hr 0.25 hr ethics</p>	<p><b>Share the Adventure: Case Autopsy One</b></p> <p>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.</p> <p>Scott D. Clarke, Clarke Divorce Financial Consultants LLC - Bedford, TX          Steven E. "Jake" Jacobson, CCD Counseling - Denton, TX          Darcy Elizabeth Loveless, Denton, TX          Camille Milner, Camille Milner, P.C. - Denton, TX</p>
<p>5:15 pm</p>	<p><b>Adjourn to reception</b></p> <p>Adjourn to reception</p>

**Friday Morning, Mar. 9, 2007**

<p>8:00 am 1.00 hr</p>	<p><b>Catch the Worm!</b></p> <p>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!</p>
<p>9:00 am 0.75 hr 0.17 hr ethics</p>	<p><b>Pack a Flashlight and Venture Into the Shadows</b></p> <p>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.</p> <p>Janice Loy Green, Farris &amp; Green - Austin, TX</p>
<p>9:45 am 1.00 hr 0.17 hr ethics</p>	<p><b>Find New Routes Through Familiar Territory—Creative Settlement Options for Children's Issues</b></p> <p>The collaborative process encourages divorcing parents to find unique solutions for their families. Experienced guides reveal unique substantive solutions to child-related issues.</p> <p>Larry Hance, Hance &amp; Wickham PC - Dallas, TX          Honey A. Sheff, Honey A. Sheff Ph.D, P.C. - Dallas, TX</p>
<p>10:45 am</p>	<p><b>Break</b></p> <p>Break</p>
<p>11:00 am 1.00 hr 0.17 hr ethics</p>	<p><b>Find New Routes Through Familiar Territory—Creative Settlement Options for Property Issues</b></p> <p>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.</p> <p>Jacqueline L. Taylor, Houston, TX</p>

## Friday Afternoon, Mar. 9, 2007

12:00 pm	<b>Pick up Box Lunch</b>
12:15 pm 1.50 hrs 0.25 hr ethics	<b>Meet New People, Learn New Things: Round Table Discussion</b>  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.  Norma Levine Trusch, Houston, TX
1:45 pm	<b>Break</b>  Break
2:00 pm 1.00 hr 0.25 hr ethics	<b>Follow in the Footsteps of the Masters: Case Autopsy Two</b>  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, Lifeway Financial Corporation - Plano, TX Kevin R. Fuller, Koons, Fuller, VandenEykel & Robertson, - Dallas, TX Linda Solomon LPC, Collaborative Consultant - Dallas, TX
3:00 pm	<b>General Session Adjourns</b>  General Session Adjourns
3:15 pm 1.00 hr	<b>For Those Who Want More...</b>  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. Join your fellow explorers for a lively, informal discussion facilitated by collaborative professionals and members of the retreat planning committee.
4:45 pm	<b>Adjourn</b>  Adjourn