



ORANGE COUNTY

www.cdsoc.com

Professional Resource Membership Application

-- New & Renewal --

A Professional Resource Member is defined as a professional who does not qualify in any other category of membership. These professionals include, but not limited to, real estate agents, financial advisors, mortgage brokers, estate attorneys, and similar type of professionals. They shall be eligible to receive referrals in their area of expertise. They are non-voting members. They will not be advertised on any membership lists or any other CDS promotional materials. However, they are eligible to be on the CDS website on a separate web page entitled "Professional Resource Members". The yearly membership fee shall be the same as for associate Members. Professional Resource Members are eligible to attend luncheons, roundtable, installation party, social events, and the Annual Member Retreat. If there is a fee for attending any of these events, they will be required to pay those fees.

Professional Resource Membership Annual Dues: **\$275.00**

Last, First, Middle Initial: _____

Business Name: _____

E-mail Address: _____

Website: _____

Cell Phone: _____

Primary Business Address

Primary Street Address: _____

City, State, Zip: _____

Business Phone: _____

Business Fax: _____

Professional Requirements

Profession: _____

Time in Professional Practice: _____

Professional License No: _____

Errors & Omissions Coverage Carrier: _____

Errors & Omissions Policy Number: _____

Errors & Omissions Policy Expiration Date: _____

Professional Training in the Collaborative Process

3-Day Collaborative Training

Training Description	Instructor/Trainer(s)	Date Completed	Hours
----------------------	-----------------------	----------------	-------

Requirements for Professional Resource Membership (without exception)

1. I have completed a 3-day training in the Collaborative Divorce Interdisciplinary Team model training approved by the CDS Board which does not include online (website based) training. Provide evidence of completion to the Membership Committee Chair if not previously submitted.
2. I agree to attend a minimum of five CDS general meetings each year. For this purpose, attending luncheons, roundtables, social events, installation party, and the Annual Member Retreat are considered general meetings.
3. I understand I am not required to be a member of the International Academy of Collaborative Professionals (IACP).
4. I agree to maintain standard malpractice/liability Insurance (errors and omissions Insurance) for my profession. Provide evidence of current insurance to CDS Membership Committee Chair and each year upon renewal.

5. I agree to indemnify and hold harmless CDS and its Board of Directors, officers or agents, from any liability and costs attendant thereto (including fees for representation and other litigation expenses), arising out of my actions as a collaborative professional or my removal from the roster by reason of my lack of adherence to the requirements described in this Professional Resource Membership Application.
6. I have completed a minimum of 18 hours of mediation training, or shall do so within one (1) year of initial membership. The mediation training must be pre-approved by the CDS Board and shall not include online (website based) training. Provide evidence of 18 hours of CDS Board approved mediation training to CDS Membership Committee Chair.
7. I agree to pay membership fees of \$275.00 annually as a Professional Resource member, due and payable on January 1st of each year.
8. I agree to maintain my professional license and/or certificate for my profession in good standing. Provide evidence of current license or certification to CDS Membership Committee Chair and each year upon renewal.
9. I consent to engage in a necessary conversation if requested to do so by the Facilitation Committee.

I certify that I have met the requirements as set forth above.

Signature of Applicant

Date

Please complete, sign and date this Professional Resource Membership Application along with all required attachments and email to amy@addlemancpas.com and mail your check made payable to “Collaborative Divorce Solutions” and mail it to our Treasurer:

Kristine Rushing
CFP®, Certified Divorce Financial Analyst®, Mediator
Financial Harmony, LLC
P. 833.340.2305
600 Anton Blvd., 11th Floor
Costa Mesa, CA 92626
www.financialharmonyllc.com

I have received and reviewed this Professional Resource Membership Application along with all required attachments and a check in the amount of \$275.00 made payable to Collaborative Divorce Solutions.

Signature of Membership Committee Chair

Date