

**APPLICATION FOR AFFILIATION AS A CLANH MEMBER  
FINANCIAL NEUTRAL**

**Before completing application please see CLANH minimum standards at  
[www.collaborativelawnh.com](http://www.collaborativelawnh.com)**

**SECTION 1: CONTACT INFORMATION**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

WEBSITE: \_\_\_\_\_

**SECTION 2: MEMBER APPLICATION**

Member requirements:

- Accreditation to practice in one of the certifications below;
- Support for the principles of Collaborative Practice;
- Completion of a minimum level of training in Collaborative Practice (12 hours of interdisciplinary Collaborative training);
- A history for maintaining high ethical standards;
- No disciplinary history;
- Intent to be available to provide Collaborative Practice services;
- Compliance with continuing education standards
- Payment of annual dues.

*If you don't meet membership requirements please consider joining as a "Supporter"*

**Information about your professional accreditation:**

Financial professionals must hold one of the following designations (circle all that apply):

CFP CPA CMA ChFC PFS

Other Certification(s): \_\_\_\_\_

Is your firm an RIA or a BD? \_\_\_\_\_ If an RIA: what states are you registered in? \_\_\_\_\_

Firm CRD #: \_\_\_\_\_ Your CRD #: \_\_\_\_\_

Briefly describe your background experience in the field of financial planning and divorce planning:

\_\_\_\_\_  
\_\_\_\_\_

**Information about your training:**

Date, location and sponsoring organization of your training in Collaborative dispute resolution:

\_\_\_\_\_

If this training was not sponsored by CLANH please attach a copy of your certificate of attendance.

**Information about your practice of Collaborative dispute resolution:**

How will you be compensated for your work in a collaborative divorce case?

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Initial below to indicate your understanding of the following requirements for work as a financial neutral:

\_\_\_ I will not attempt to sell any investment, insurance or other product to either party in a collaborative divorce case;

\_\_\_ I will not solicit a party in a collaborative divorce case for engagement of financial planning or investment management after completion of my work as a financial neutral\*;

\_\_\_ I will not work with a party who solicits me for engagement of financial planning or investment management if I have provided services to that party as a financial neutral\*

\*Transitional planning is allowed

**Disciplinary history: initial below**

\_\_\_ I certify that no disciplinary action has been taken against me within the past 5 years by a professional regulatory or certifying organization in any jurisdiction.

I certify that the information contained herein is true and accurate.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please mail your application to: CLANH, PO Box 803, Londonderry, NH 03053.

Thank you!