

**SUGGESTED MINIMUM MEMBERSHIP CRITERIA  
FOR OCLF COLLABORATIVE PROFESSIONALS**

**COLLABORATIVE LEGAL PROFESSIONALS:**

1. Be a member of the Law Society of Upper Canada
2. Be a Barrister and Solicitor / Lawyer, LL.B. or J.D.
3. Have completed 40 hours of collaborative training, including interest based negotiation skills training and collaborative family law skills training.
4. Have professional errors and omissions insurance coverage of at least \$1million.

**COLLABORATIVE FINANCIAL PROFESSIONALS:**

1. Be a member of a recognized financial professional regulatory body.
2. Have one or more of the following designations:

CFP	Certified Financial Planner <i>Financial Planners Standards Council (FPSC), Mutual Funds Dealers Association (MFDA), ADVOCIS, Financial Advisors Association of Canada (FAAC)</i>
CMA	Chartered Management Accountant <i>Certified Management Accountants of Ontario</i>
CA	Chartered Accountant <i>Canadian Institute of Chartered Accountants</i>
CGA	Certified General Accountant <i>Certified General Accountants of Ontario</i>
Ch.F.C	Chartered Financial Consultant <i>ADVOCIS, FPSC, FAAC</i>
CLU	Chartered Life Underwriter <i>ADVOCIS, FPSC, FAAC</i>
PFP	Personal Financial Planner <i>Institute of Canadian Bankers</i>
FDS	Financial Divorce Specialist <i>Academy of Financial Divorce Specialists (AFDS), FPSC, ADVOCIS</i>
CDFA	Certified Divorce Financial Analyst <i>Institute of Divorce Financial Analysts (IDFA), FPSC, ADVOCIS</i>
FCIA	Fellow of the Canadian Institute of Actuaries <i>Canadian Institute of Actuaries</i>

CBV	Chartered Business Valuator <i>Canadian Institute of Chartered Business Valuers</i>
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3. Have completed 40 hours of collaborative training, including interest based negotiation skills training and collaborative family law skills training.
4. Minimum of 16 hours of basic training in the fundamentals of family law, with a recommendation to complete 30 hours of family law training.
5. Have professional liability insurance coverage of at least \$1million.

### **COLLABORATIVE MENTAL HEALTH / FAMILY PROFESSIONALS**

1. Be a member in good standing of a recognized mental health professional regulatory body and be recognized as a mental health professional under Ontario legislation (*Regulated Health Profession Act, 1991; Regulated Health Professions Statute Law Amendment Act 2009; Social Work and Social Service Work Act, 1998 (Section 26) (Ontario Regulation 384/00); Psychotherapy Act 2007*).
2. Hold one of the following designations:

MD	Psychiatrist <i>College of Physicians and Surgeons of Ontario</i>
PhD, Psy.D, Ed.D, D.Psy	Doctor of Philosophy – Clinical Psychologist <i>College of Psychologists of Ontario</i>
M.A, M.Sc.,M.Ps., M.Ed	Psychological Associate <i>College of Psychologists of Ontario</i>
RSW, MSW	Registered Social Worker, Master of Social Work <i>Ontario College of Social Workers and Social Services Workers</i>

**Note: The following additional designations are expected to be regulated under the College of Psychotherapists and Registered Mental Health Therapists of Ontario, which is anticipated to be fully functional in 2012:**

RMFT	Registered Marriage and Family therapist
CCC	Canadian Certified Counsellor Canadian Counselling and Psychotherapy Association
OACCPP	Ontario Association of Consultants, Counsellors, Psychometrists and Psychotherapists College of Psychotherapists and Registered Mental Health Therapists of Ontario

3. Have completed 40 hours of collaborative training, including interest based negotiation skills training and collaborative family law skills training.
4. Minimum of 16 hours of basic training in the fundamentals of family law, with a recommendation to complete 30 hours of family law training.
5. Have professional liability insurance coverage of at least \$1 million.

**“ASSOCIATE” MEMBERS:**

Professionals who are not members of a regulatory body, and who take 40 hours of Collaborative training, may be considered by practice groups for associate memberships. *The OCLF recommends that associate members not be given full membership privileges such as being listed on the public website.*

**FOR ALL COLLABORATIVE PROFESSIONALS:**

The OCLF recommends additional training in interest-based negotiation skills beyond the basic membership criteria for all collaborative professionals. We expect that members will continue to upgrade their skills through further training and professional development on an annual basis. An annual minimum requirement of 8 hours is recommended.