**\*\* AND \*\* COLLABORATIVE FAMILY LAW MATTER**

**MINUTES OF 1ST 5- WAY MEETING**

**Venue: Zoom**

**Date/Time:**

**Present: Patricia Parker**

**Peter Parker**

**Susan Storey (Patricia's Lawyer)**

**Joe Johnson (Peter's Lawyer)**

**Mary Mathey (Coach)**

**Bertha Bacon (Minute Taker)**

**STAGE ONE**

1. **Welcome:** Mary welcomed everyone to the process
2. **Explanation of the Collaborative process:** Susan and Joe gave an explanation of the collaborative process and reviewed the ground rules.
3. **Review and virtually sign Participation Agreement:** Joe and Susan summarised the Participation Agreement and Patricia and Peter then signed the Agreement. The Agreement will be circulated electronically following the meeting and will be signed by all parties
4. **Statement of Goals and objectives:**

Patricia and Peter gave their opening statements – copies of which are **attached**.

**STAGE TWO**

1. **Interim Issues:**
   1. **Funding the Collaborative process:**

* Mary gave examples on different ways of funding the process.
* Discussion that Peter has received the sum of $30,000 loan from his family to fund his rent and legal fees to date. Whilst Peter will try to get that loan converted into a gift, at this stage will need to be included in the Balance Sheet as a loan.
* DD and JJ have not yet separated their bank accounts and both of them are depositing their salaries into the joint account to fund their day to day living expenses. They also have a redraw facility on their mortgage which they can access.
* **It was agreed** that Patricia and Peter would use joint funds to fund the collaborative process.
  1. **Parenting Update**
* Mary explained that a 5:9-time arrangement as per parenting plan is currently in place with the boys, however that has only recently been implemented as, because of COVID-19 and school holidays, Patricia and Peter had been sharing in the care of the children equally. The current arrangements are subject to review and Mary will liaise with Patricia and Peter re future parenting arrangements.
* Patricia advised that an online calendar is currently being set up and will be shared between parties. Mary advised that there have been some issues recently re the parties respecting each other's space and a discussion ensued in relation to that issue.
* **It was agreed** that Patrick will call ahead to let Patricia know when he is coming to pick up something and will not to use the children as messengers.

1. **Substantive Issues**
   1. What needs to be resolved

* Revisit parenting in 3-6 months’ time
* Property settlement
* Financial support
  1. Rough Balance Sheet prepared as per attached.
  2. *If there are any complex issues in the Balance Sheet, explain them here.*

Peter explained that in relation to the XYT Trust:-

* It is a discretionary Trust
* Peter is the sole Trustee and Appointor
* The assets of the Trust comprise…..
  1. **It was agreed** that next steps are:-
* Patrick to obtain 3 real estate appraisals for Mosman
* Patricia to contact their accountants and obtain updated SMSF financials
* Patrick and Patricia will provide payslips, their most recent tax returns, share valuations, current bank statements and any other relevant financial information and Joe will update the Balance Sheet in readiness for our next meeting.

1. **Agreements reached:**
   1. Parties will use joint funds to fund the collaborative process.
   2. Patrick will call ahead to let Patricia know when he is coming to pick up something and will not to use the children as messengers
   3. Next steps as per item 6.4

**STAGE THREE**

1. **Agenda for next meeting:**

At the next meeting we will be addressing interests, needs and concerns in order to help Patricia and Peter to identify what is important to each of them in making decisions for their respective futures.

1. **Work to do before next meeting:** 
   1. Homework as per agreements above.
   2. Bertha will prepare the Minutes of the meeting and end to Mary to circulate
   3. Peter will update Balance Sheet and circulate.
2. **Time and place for next meeting(s):**

Date:

Time:

Venue for next meeting:

Date:

Time:

Venue:

Meeting closed at 5.00pm