

THE BULLPEN: BRINGING IN YOUR PARALEGAL
*Navigating Your Paralegal's Influence in a
Collaborative Case from Start to Finish*

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CHAPTER 17

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EDUCATION AND LICENSES

Admitted to the State Bar of Texas in 1996
St. Mary's University School of Law, San Antonio, Texas (JD, 1996)

- Phi Delta Phi – Legal Honor Society

Texas A&M University, College Station, Texas (BS, 1992)

- Corps of Cadets

EMPLOYMENT

Bashara Schwartz, PLLC

- Partner (January 2021–Present)

Bashara & Schwartz, P.C.

- Shareholder/Office Manager (2011–2020)

Law Offices of Sam C. Bashara, P.C.

- Associate Attorney/Office Manager (2001–2011)

Bexar County Office of the District Attorney

- Assistant Criminal District Attorney (1996–2001)

MILITARY SERVICE

United States Navy (1992–2010)

- Lieutenant Commander, Designator 1105

ORGANIZATIONS, MEMBERSHIPS AND HONORS

Master Credentialed Collaborative Professional, Collaborative Divorce Texas (Credentialed – 2018. Master Credentialed – 2021)
AVVO Rating – 10 (Superb)
SA Lawyers Best of – Family Law (2012–2021), SA Scene Magazine
SA Lawyers Best of – Collaborative Law (2011–2021), SA Scene Magazine
Fellow, Texas Bar Foundation (2017–Present)
Member, State Bar of Texas (1996–Present)

- Treasurer, Collaborative Law Section (2014–2015)
- Course Director, State Bar of Texas – Collaborative Law Course 2012
- Assistant Course Director, State Bar of Texas – Collaborative Law Course 2011
- Planning Committee, State Bar of Texas – Collaborative Law Course 2007, 2018,

and 2020

Member, San Antonio Bar Association (2001–Present)

- Family Law Section (2001–Present)
- Ethics Committee (2006)
- Community Relations/Media Response Committee (2006)

Member, Collaborative Divorce Texas (2003–Present)

- Past President (2013–2014)
- President (2012–2013)
- President-elect (2010–2012)
- Board of Trustees (2007–2015)
- Chairman, Website Committee (2007–2011)
- Course Director, Interdisciplinary Collaborative Law Training, September 27–28, 2007
- Course Director, Interdisciplinary Collaborative Law Training, May 14–15, 2009
- Coordinator, Advanced Family Law Course Exhibit Booth (2007–2015)
- Member, Public Relations Committee (2006–2007)
- Member, Spring Retreat Planning Committee (2007)
- Member, Education, Training, and Credentialing Committee (2014–2017)

Member, International Academy of Collaborative Professionals (2008–Present)

Charter Member, Collaborative Divorce Professionals of San Antonio (2006–Present)

- President (2006–2007)
- Board of Directors (2007–2009 and 2020)

Fellow, College of the State Bar of Texas (Member 2005 – 2019, Fellow – 2019–Present)

Member, San Antonio Young Lawyers Association (2005–2006)

Member, Texas District and County Attorneys Association (1996–2001)

Director, Crownhill Park Neighborhood Association (2007–2009)

Member, Town Club (2003–Present)

Member, German Club (2004–Present)

Stephen Minister, First Presbyterian Church of San Antonio (2009–2011)

5x Ironman Triathlon Finisher

FREQUENT AUTHOR AND SPEAKER ON COLLABORATIVE LAW AND ALTERNATIVE DISPUTE RESOLUTION.

Education:

Daemen College, B.A. in English and Minor in Spanish
Summa Cum Laude, 3.89 GPA

Certificates and Recognition:

State Bar of Texas Collaborative Course Planning Committee (2021-current)
Dallas Area Paralegals Association Events Chairman and Vice President of Programs (2019- current)
National Federation of Paralegals Association (2018-current)
Advanced Paralegal Program, University of Houston-Downtown (2018)
National Notary Association; Commissioned Texas Notary (May 2017-Current)
Daemen College President's Scholarship Award (2009-2013)

Key Skills:

Legal technology: NetDocuments, West Law, ProDoc, FileTime/Texas e-File system, ShareFile, and Centerbase
General technology: MiCollab phone conferencing, iSolved, Adobe Acrobat, Microsoft Office Suite, Outlook, Teams, and Zoom
Administrative and soft skills: Conflict checks, prepare and manage retainer agreements, draft and edit legal pleadings, local county rules research, customer service, event planning, and social media marketing

Professional Experience:

Goranson Bain Ausley, PLLC

Paralegal for Collaborative Divorce Attorney and Managing Partner Esther R. Donald | July 2020 - current | Dallas, TX

- Lead client intake for collaborative divorce cases and marital agreement cases
- Regulate attorney calendar for scheduling deadlines, joint meetings, team meetings, and court settings
- Prepare participation and confidentiality agreements
- Draft and e-file case pleadings, notices of collaborative procedures, and case status reports
- Plan, prepare for and attend joint meetings and produce meeting minutes
- Assist with the drafting of divorce decrees, premarital agreements, and required ancillary documents to confirm case closure
- Mentor other paralegals within the firm and represent the firm in external conferences

Verner Brumley Mueller Parker, P.C.

Paralegal for Partner Jim Mueller and Associate Amy T. Ford | June 2018 - June 2020 | Dallas, TX

- E-filed and e-serve notice of hearings, motions, discovery, certificates, and orders to formally serve opposing party
- Informed clients of relevant documentation needed to execute inventories and calculated equitable property division
- Drafted discovery response templates and prepared production documents for bates stamping and service
- Familiarized the attorney with county rules and court procedures for productive case handling
- Analyzed and created index for discoverable documents to reference during hearings, mediations, and trial
- Facilitated mediation and deposition arrangements

Fullenweider Wilhite, P.C.

Legal Assistant for Partner Michael C. Childs | February 2016 – May 2018 | Houston, TX

- Gathered case information through client intake along with logging all calls for quick consult scheduling
- Composed and prepared client agreement documents and updated internal accounting records to solidify engagement
- Formatted and edited attorney correspondence regarding pending issues and settlement proposals
- Communicated with court staff and process servers regarding citations, settings and certified copy requests

GEICO

Customer Service Representative | September 2013 - January 2016 | Houston, TX

- Counseled customers on policy needs with clear and concise communication
- Identified the customer's concern and provided customized recommendations based on individual circumstances
- Documented and secured all findings to conclude liability and protected company from fraudulent claims

Office of the Attorney General, Child Protective Services

Intern | January - May 2012 | Washington, D.C.

- Consolidated evidentiary information (e.g., documents and witnesses) to improve attorney's hearing preparation
- Conducted research utilizing government databases and determined criteria for detailed witness testimonies
- Drafted stipulations and final orders for hearings under tight deadlines

Neal, Gerber, & Eisenberg LLP, IT Law Department

Intern | August 2009 | Chicago, IL

- Organized research on escrow software and presented findings of client needs to IT law team
- Attended negotiation settlements with attorney and produced meeting notes

Sarah Aminzadeh Milinsky

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Education

University of North Texas Dallas College of Law, Dallas, TX May 2021

- Juris Doctorate, Cum Laude
- Dean's List – Fall 2018, Spring 2019, Spring 2020, Fall 2020, Spring 2021
- CALI Award – Evidence, Fall 2020

University of North Texas, Denton, TX December 2017

Bachelor of Arts in Psychology

- Legal Studies Certificate
- Dean's List – Spring 2016, Fall 2016
- President's List – Spring 2017, Fall 2017

Experience

Law Clerk, Goranson Bain Ausley, PLLC, Dallas, TX October 2020 – Present

Goranson Bain Ausley specializes in divorce and other family law issues.

- Observe mediations, depositions, and hearings
- Draft divorce decrees, discovery, motions, and other pleadings relating to divorce proceedings
- Research case law and applicable statutes involving family law matters

Law Clerk, Forester Haynie, PLLC, Dallas, TX May 2019 – October 2020

Forester Haynie specializes in labor and employment law, mass tort litigation, and personal injury.

- Spoke with potential clients, gathered their information, and determined whether a case exists
- Drafted complaints, various motions, and other legal documents
- Researched applicable case law and federal statutes in relation to pending cases

Intern, Texas Humane Legislation Network, Dallas, TX January 2020 – May 2020

THLN is the *only* state-based animal organization that serves to address unjust animal welfare laws.

- Conducted extensive legal research regarding animal welfare laws across the United States.
- Drafted memorandums and letters involving current animal cruelty cases in Texas

Intern, Denton County Criminal District Attorney's Office, Denton, TX July 2019 – August 2019

- Observed countless felony and misdemeanor trials, hearings, and *voir dire*s
- Worked closely with Assistant District Attorneys in processing and prosecuting criminal cases
- Assisted with trial preparation, analysis of pending legislation, and investigation

File Clerk, Kaplan & Moon, PLLC, Dallas, TX April 2017 – August 2018

Kaplan & Moon specializes in business litigation, real estate, corporate law, and probate.

- Created and maintained organization of client files
- Drafted engagement letters, demand letters, and pleadings
- Assisted in discovery and factual investigation on collection cases

Scholastic Activities

Editor-in-Chief, UNT Dallas Law Review publishing *Accessible Law* Fall 2019 – May 2021
Accessible Law is a student-run publication with the primary purpose of publishing a multimedia journal that provides the public with access to justice.

Champion, Kastl Law Mock Trial Competition February 2021
Participated as a witness in the First Annual Kastl Law Mock Trial Competition.

President/Founder, Student Animal Legal Defense Fund Spring 2019 – Spring 2020
SALDF is a student organization affiliated with the Animal Legal Defense Fund and shares its mission to protect the lives and advance the interests of animals through the legal system.

Community Engagement

Volunteer, Becky's Hope Horse Rescue November 2019 – March 2020
Becky's Hope Horse Rescue is a non-profit charity dedicated to the rescue, rehabilitation, and rehoming of abused, neglected, and abandoned farm animals. Volunteer activities include caring for the farm animals, mucking pastures and stalls, and maintaining the farm in general.

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THE BULLPEN: BRINGING IN YOUR PARALEGAL

Navigating Your Paralegal's Influence in a Collaborative Case from Start to Finish

I. INTRODUCTION

Having a successful collaborative law practice while solely managing countless responsibilities of a full case load can be difficult. While looking to pursue more collaborative divorce cases, the attorney should also be open to involving the paralegal to join for a constructive and full team effort. Knowing how to properly utilize your paralegal as your secret weapon on and offline during the course of a collaborative case can guarantee seamless and productive collaborative case management, as well as satisfied clients.

II. CLIENT INTAKE

One of the most important roles your paralegal can play in your collaborative divorce practice is screening for the individuals who will benefit from the process. If your paralegal participates in your collaborative divorce cases, your paralegal will have the foundation needed to determine whether to pitch the process to the client after the conflict check has cleared. The client intake method needs to be more involved than a standard conflict check when trying to achieve a solid collaborative divorce practice. Connecting with potential new clients immediately by providing a sense of empathy and acknowledgement of their situation will make them feel comfortable to further engage with the paralegal. The potential client may share more key information or rather, imply his or her goals, around the divorce. With experience in the collaborative divorce process, the paralegal can find similarities with current cases and recognize prospective cases to continue a successful collaborative-based practice.

Pitching the collaborative divorce process to the potential client can be cued by two categories of topics mentioned in the initial conversation: the Relationship Dynamic and Special Family or Individual Circumstances. The potential new client is already calling because of the broken state of the marriage, but he or she will typically refer to how “in tune” the current relationship is now that divorce is on the table. The parties’ relationship could be considered productive if the potential client refers to “we want” versus “I want.” Further, if the client communicates that both parties are civil or mutually agreeable that the divorce should take place but fear lack of control over the process, this client and the spouse might be excellent candidates for the collaborative divorce process.

The potential client may also refer to the state of the relationship by mentioning the care of their children. If the client states that both parties have been adequate co-parents or their mutual divorce goals surround what is ultimately best for their children, then the paralegal can pitch the process in this case. If the paralegal can sense any common ground in the state of the relationship, then the paralegal can be confident about suggesting and explaining the collaborative divorce process. Even when the client does not specifically refer to the relationship but states the client or both parties have the desire to avoid Court involvement and therefore remove the spiteful battle component from the divorce, this conversation opens the door to pitch.

Sometimes the initial conversations with a potential new client may not focus on the relationship at all, but those individuals should not be automatically ruled out for a conversation about collaborative divorce. Potential clients can mention certain circumstances in their life that the collaborative divorce process can manage more professionally and efficiently. The target client or both parties might be mainly concerned about the impact of the divorce on the family’s financial state or the family’s reputation or social status. The potential client might mention that there are complex investments or a complex estate in general that requires more attention and assistance to navigate through to a successful resolution. In the alternative, the client may advise that his or her estate is modest (or that the client or the couple is very cost conscious), and the goal is to keep as much of the estate intact as possible. Both financial circumstances should be allowed the opportunity to remain out of the Court’s control and receive the help of a neutral team of professionals and their expertise to analyze and divide the estate.

Another unique circumstance can again arise because of the potential client’s description of the children who will be affected by the divorce. The party could state that one of their primary concerns is for their child and/or children with special needs. The client’s concern and fear can be appeased because the process allows extra guidance while planning for the unknowns. Specifically, the collaborative process and its professionals can provide an abundance of resources to both clients when creating or restructuring any special trusts and establishing concrete orders concerning the livelihood and care for the children well into their adult lives.

Lastly, there needs to be consideration for the process when dealing with more personal and sensitive matters where the individual’s reputation or social status can be negatively altered during a publicly accessible divorce. Some clients desire to remain out of the Court’s limelight due to the fact they are dealing with a major struggle such as substance abuse or working towards recovery from the same. A lot of times this type of case will be in the center of a courthouse battle, and unfortunately, the litigation component usually causes more harm to the individual and family in the long haul of the case. A client or party dealing with substance abuse or recovery should not be deemed unworthy

to participate in the collaborative process and if willing, should be encouraged to try the process for the benefit of the whole family. In addition to this scenario, those individuals who are subject to celebrity limelight can also find safety and dignity away from the courthouse via the confidentiality of the collaborative process. While these are all unique scenarios, there is a correlation in the fact that they each have been examples of collaborative divorce cases that our paralegals bring into the practice. These are only a few examples of cases that strong collaboratively trained lawyers and neutrals can successfully settle. The collaborative paralegal's sharp ability to spot and connect cases with other successfully settled cases provides a pathway to a reassuring future for the clients in a multitude of ways.

As the paralegal develops further collaborative experience, the more his or her understanding grows about those who can find personal gratitude and prosperity from the process. After being able to recognize which cases can be collaboratively handled, the paralegal needs to tailor and sharpen the pitch about the process to seal the commitment. If your paralegal is just joining your collaborative team with little to no experience, the first lesson should be to establish the paralegal's comprehension about the core commitments and benefits of a collaborative divorce. The paralegal should be able to emphasize four core values: Honesty, Transparency, Confidentiality, and Customization. The paralegal should present the values to the client in a way that the client can personally identify with based on his or her divorce. Once the client finds a connection with the collaborative model, the paralegal should be able to answer most follow-up questions from the potential client about the structure and method of collaborative law. If the paralegal becomes part of your professional team, the paralegal can be more prepared to address these questions with the client. This conversation will prepare the client for the initial consultation and save time for more in-depth discussion with the attorney.

After the pitch is given, the paralegal can further educate the prospective client about the process by sending a follow-up email with resources. When sending an email after the call to confirm the consult and further intake instructions, there is an opportunity to provide resources whether in-house or third-party materials about collaborative divorce. Examples of viable resources can be pamphlets, a link to the Collaborative Divorce Texas website, and links to the collaborative attorney's blogs, podcasts or videos discussing different aspects of the process. The attorney has most likely spent time and funds for influential marketing and these marketing tools should be used in addition to being available on a firm's website. If the attorney has any additional recommended reading materials such as a book, the paralegal can provide or recommend this material to the individual before or immediately after the consult. When your paralegal puts in more effort to educate a potential client about the process, the more appreciative the client will be. Even if the individual does not end up filing for divorce and/or committing to the process, the effort will more than pay off when that individual refers others to your practice.

As much as the paralegal should be confident and should develop an understanding about when to pitch the process, the paralegal should also exercise the same judgment for those who will likely not benefit from the process. This skill takes time and experience to master and usually is a final judgment call for the attorney to make. The effective collaborative paralegal knows that collaborative divorce is not one-hundred percent appropriate or valuable for all individuals and cases. We should not push or force the process on every incoming client just because we believe in the process, or the attorney/paralegal team is attempting to move their practice entirely to collaborative divorce. If the attorney/paralegal team is part of a larger firm, the paralegal can connect the prospective client with another in-house attorney who is seasoned to assist with litigation matters, thereby keeping the case with the firm. If the paralegal is working with a sole practitioner, that paralegal should be knowledgeable about his/her attorney's litigation referrals. The attorney, with the help of a tenured collaborative paralegal, may consider creating an outline or other training tools for current and future staff. Sharing informative tools will promote proper screening for new staff and streamline intake. Overall, the duty of a collaborative paralegal is to serve both the client needs and the process. It is important to preserve the value and unique nature of the collaborative process by avoiding cases that can potentially opt out and require the Court's assistance.

III. FACILITATING THE COMMITMENT TO THE PROCESS

Another area where paralegals can be a key part of the collaborative team is with helping to facilitate the commitment of the clients and the team to the collaborative process. Two ways to assist and support this commitment are by serving as the collaborative process' "personalized communicators" and as the "established recordkeepers." These roles can help create an opportunity to bring greater efficiency and cost-effectiveness to the process by taking various administrative and logistical duties off the attorneys' plates while also delivering to the clients a superior customer service experience.

In the role of the collaborative process' personalized communicator, paralegals can shoulder the responsibility of efficiently scheduling calls and meetings while navigating and coordinating the complexities of multiple professionals and clients' schedules. While a little bit "tongue in cheek," the authors have shared with more than a few clients the observation that coordinating six busy schedules in search of agreeable dates and times for calls and meetings can sometimes be one of the more daunting obstacles to moving a collaborative case from inception to conclusion.

In addition to the challenges of efficiently coordinating multiple calendars, skilled collaborative paralegals will also need to be knowledgeable and mindful of the differences between team communications, joint communications, and attorney-client communications in order to support efficient, honest, and trustworthy communication while ensuring the preservation of confidences appropriate to each type of communication.

An all-too-common client complaint expressed about attorneys is a lack of timely acknowledgement and response to client communications. Making paralegals an active part of the collaborative team is an opportunity to provide “white glove” service to the clients. The paralegals can often be a resource for the attorneys and for the team to ensure professional, attentive, timely responses to client communications and to convey a sense of empathy and awareness of client needs, questions, and concerns when their attorney is not immediately available. Paired with the right “bedside manner,” a paralegal in the collaborative process can help ensure a client knows their communications have been received and can reassure them their attorney is “hearing” the client and will respond in a timely way.

As the collaborative process’ personalized communicators, paralegals can help foster the clients’ confidence in the collaborative process and can help create cost efficiency without sacrificing, and often times even enhancing, the clients’ customer service experience related to the logistics and administration of their collaborative case.

In the role of the established recordkeepers of the collaborative process, paralegals whose experience and skill sets include general family law and civil procedure, and a nuanced understanding of the collaborative process can deliver a level of professional service to the clients which the whole team can be proud. In the beginning of a new collaborative case, the paralegals can take the lead with preparing draft introductory letters to new clients, drafting pleadings (including suitable and appropriate customized language tailored to support the spirit of collaboration) and drafting emails or letters to the other spouse or partner inviting them to consider using the collaborative process. A thorough familiarity with the proper forms and with the resources to ensure the most up to date forms are being used is a must. Collaborative paralegals can also assist with drafting initial documents to begin the collaborative process, circulating those documents with the team and clients, and assisting with technology and applications to help with reviewing and executing those documents. Lastly, paralegals should have a good understanding of the significance and relevance of documents commonly used in the collaborative process (*e.g.* understanding the difference between a Confidentiality Agreement and a Participation Agreement as it pertains to communications, expectations, and confidentiality when beginning a new case).

Paralegals can also be of considerable assistance in the role of the established recordkeepers of the process by having a good understanding of how to properly and timely communicate with courts, including e-filings, to advise that the case is “off the trial docket” (*e.g.* filing of a Notice of Collaborative Law Procedures), ensuring pleadings or another suitable agreed filing includes an abatement of the initial disclosures requirement, identifying and tracking court deadlines for filing of status reports in accordance with local rules, and with coordinating the procedures for the “prove up” (*e.g.* in person, by Zoom, by electronic submission, etc.) to conclude a collaborative divorce.

Paralegals can also provide enhanced efficiency for the process by preparing drafts of introductory emails to the clients and the team related to logistics and getting organized to begin a new collaborative process and with the preparation of documents for the first joint session (*e.g.* Road Map to Resolution, Expectations of Conduct, Agenda, etc.). Under circumstances where there is only one paralegal available, while that paralegal may be employed by only one of the attorneys, they can still be viewed as a more broadly available resource by building a good rapport with both of the clients. Paralegals can also be helpful assisting, as needed, with the collection and secured transmission of documents in order to prepare joint inventories and budgets in circumstances when the clients have decided not to include a financial professional as a part of their collaborative team.

Paralegals who have good knowledge of family law procedures and the collaborative process are a powerful resource to assist with keeping the process organized, logistically on track, private, and with helping to deliver a high-quality customer service experience for the clients.

IV. BEHIND THE SCENES PREPARATION, ATTENDANCE FOR JOINT MEETINGS, AND CASE FOUNDATION

One of the most effective ways to ensure a productive collaborative practice is by having your paralegal heavily involved in the behind-the-scenes preparation. From the start of your case, have your paralegal draft the joint meeting agenda for each joint meeting and circulate timely before the day of the meeting. Your paralegal should understand that an effective joint meeting agenda will set your client’s expectations, prepare the client, and allow the client to offer input regarding topics that might require more focus. In addition to drafting the joint meeting agenda, have your paralegal take and prepare the minutes for each joint meeting. Attending and paying close attention to the discussions of each joint meeting will give your paralegal a better understanding of the upcoming focus topics. More importantly, your paralegal will be able to productively customize the agenda to fit the specific goals of each joint meeting.

Moreover, designating a paralegal as the assigned minute-taker allows the attorneys to be more engaged in each joint meeting. By eliminating the pressure of having to note each agreement and concession, attorneys can properly

focus on what they were actually hired to do—advocate for their client. And unlike an attorney who is expected to participate throughout the entire meeting, a paralegal's only focus during a joint meeting can be to take the minutes. Thus, as a silent participant, your paralegal has the potential to take comprehensive notes regarding important details, such as compromises between clients, proposals that may need to be discussed in the future, or assignments for the next meeting.

Additionally, keeping your paralegal as the sole minute-taker for each joint meeting ensures an efficient turnaround time for minutes, as well as a better foundation for drafting potentially complex documents, such as the Collaborative Law Settlement Agreement or the Agreed Final Decree of Divorce. As the designated minute-taker, your paralegal will in turn organize and keep track of all documents drafted by the Neutral Professionals as they develop (i.e., Estate Spreadsheet, Parenting Plan, etc.) that are essential to drafting the final settlement agreements. The paralegal will also know to include any documents reviewed during the joint meeting as exhibits to the joint meeting minutes. Continuous attendance at joint meetings also allows your paralegal to be constantly updated about the case's status and therefore be in tune with the client's values and needs. Thus, your paralegal can offer additional perspective or catch anything the other team members may have missed during joint meetings, such as body language or subtle comments between clients.

Although you may want your paralegal to assist with certain specialized tasks, you must proceed with caution. For example, though you may ask your paralegal to create the bones of the estate spreadsheet, he or she may not map estate division proposals or otherwise provide advice on behalf of the Neutral Financial Planner based on his or her experience with previous similar cases. Similarly, your paralegal may not outline or draft a Parenting Plan that is required to be composed and produced by the Neutral Mental Health Professional. This task requires the strategic facilitation and expertise of the Mental Health Professional as he or she will ensure the clients' agreements are accurately listed. Your paralegal can and should be utilized to assist in a variety of helpful tasks, but it is vital that you and your paralegal understand the roles and responsibilities of each member of the Team, including the Neutral Professionals, and therefore assign the responsibilities accordingly.

V. GUIDING THE CASE TOWARDS RESOLUTION.

Another area paralegals can be key contributors to the collaborative process is with helping to guide the case towards conclusion when it is time to “paper the deal.”

A hallmark of the collaborative process is giving clients the opportunity to craft settlements that are customized to their own unique needs, preferences, and circumstances. Collaborative agreements can often be quite different from the “cookie cutter” resolutions that are more commonplace in the traditional model of Texas Family Law jurisprudence. The opportunity to create customized agreements; however, also comes with the potential for increased cost in the form of the professional time necessary to develop custom language to memorialize those agreements. A “drafting bank” can be a fantastic resource to avoid having to constantly “re-invent the wheel.” It is highly recommended that collaborative attorneys establish and continually grow and refine their drafting banks by including new sample language they have created or encountered in their experiences as collaborative practitioners for both parenting plans and property resolutions. Even if the drafting bank does not have exactly the right language for a couples' resolution, it can often be at least a good starting point for the development of new language so that the attorney does not have to start from scratch. Paralegals who have good familiarity with the content of their collaborative attorney's drafting bank can be enormously helpful by quickly and efficiently preparing initial drafts of decrees and agreements incident to divorce. As each case resolves, the paralegal can take the lead with identifying new language or variations or refinements on existing language for addition to the attorney's drafting bank. In this way, the paralegal can be the custodian of the attorney's drafting bank and should be continually on the lookout for new customized language from closing documents or from CLE articles they encounter that may be worth adding to the bank.

The drafting of accurate and professional closing documents is an important product all lawyers have a responsibility to produce for their clients. Paralegals are again a valuable resource to successfully deliver on this obligation. Whether gathered by the neutral financial professional or by the paralegals, once the clients have come to settlement and it is time to draft, it is important that paralegals have available complete copies of the source documents gathered to confirm correct asset and liability listings and information, such as account styles and numbers, vehicle identification numbers, and other information important for the proper identification and description of assets and liabilities. Additionally, paralegals can research county records to get copies of documents related to real property to ensure the closing documents include correct legal descriptions and debt information. This work performed by the paralegal, of course, does not relieve the attorneys from their responsibility to review and confirm the information contained in the closing documents is accurate; however, the paralegal's efforts at gathering and organizing the source documents and information is another way to create efficiency and to help reduce unnecessary expenditure of attorney's time.

Paralegals can also help with guiding the collaborative case to conclusion by taking the lead on drafting ancillary documents such as the joint inventory and appraisements, deeds, deeds of trust, and powers of attorney. In circumstances where a collaborative resolution includes promissory notes, security instruments, business entity documents, complex real estate documents or estate planning documents, it may be the case that a transactional, real estate, business, or estate planning attorney is needed; however, to the extent the collaborative attorney is comfortable with preparing some, or all of these ancillary documents, the paralegal once again can be a resource by preparing these draft documents, including drawing on the attorney's drafting bank for custom language, as needed.

In the role of helping to guide the case to conclusion, paralegals can also assist with a variety of administrative and logistical tasks such as providing notary services, creating a checklist of the documents that need to be executed to complete the closing, preparing a draft of an end of engagement letter to the client, assisting clients with retrieving a copy of their file, keeping the neutral professionals apprised of progress towards the completion of the case, and helping to facilitate the collection of final payments or processing of client refunds.

As a final note, paralegals can be helpful with managing client expectations related to the timing and the logistics necessary to conclude their collaborative case.

As with the other aspects discussed in this paper, a skilled paralegal's assistance with guiding a collaborative case towards conclusion is a valuable resource that, if harnessed properly, can create a more efficient and cost-effective process, as well as an enhanced customer service experience for clients.

VI. MAKE YOUR PARALEGAL THE ULTIMATE SECRET WEAPON

In addition to encouraging your paralegal to participate in collaborative divorce cases, another investment for your practice is to also encourage your paralegal to be motivated to learn more about the collaborative process. Your paralegal's skill set will develop professionally and efficiently by pursuing educational opportunities. The attorney can utilize his or her connections in the collaborative divorce network to find these opportunities for the paralegal. Invite the paralegal to join you for any Collaborative Law CLEs via your local practice group, local Bar associations, CDT, or the State Bar's Collaborative Section. If your firm provides internal office training, encourage the paralegal to attend these sessions even if they are during office hours. The more information and education your paralegal receives, the better prepared your team will be to serve your clients. Another investment the attorney can contribute towards is being a mentor to the paralegal. Consider personally mentoring the paralegal and by doing so, the attorney and paralegal will develop great rapport and eventually be the ultimate collaborative team. Continually sharing knowledge, experiences, opinions, and thoughts about collaborative divorce will give the paralegal compelling lessons for a fulfilling and successful collaborative career.

VII. CONCLUSION

By incorporating your paralegal into the collaborative team, he or she will provide an efficient, empathetic, ethical, and economical service to you, the neutral team, and your clients. The collaborative paralegal can play many roles to assist the attorney as the comprehensive communicator between your client and Neutral Professionals, as well as the backbone for drafting collaborative documents. An involved paralegal will help improve the efficiency of your practice by vocalizing ways to be proactive and promoting ideas to better serve the client. Your paralegal can—by setting expectations early and providing adequate legal education—learn to juggle multiple roles and develop a tailored skillset to guarantee an overall prosperous collaborative practice.