







PERSONALISED ACTION PLAN

00/00/2000




Dear Jill/Greg,

Thank you for consulting me at Smart Separation. It was pleasing to see you looking lighter when you left our office than when you arrived, and we really appreciated your thanks. It means a lot to us to know that we are making a difference to people, since that is the reason we are here.

Your Smart Separation meeting summary:

	<p>To Date: You have been talking to Greg/Jill about your wish to separate. He/she is upset and angry. You are both worried about this big change, but you think you will manage to be reasonable for the sake of your children. Your communication and the way you have managed conflict in the past has let you down. He/she says he/she cannot trust you now.</p>
	<p>Do you feel ready? You are clear about the decision to end your marriage. You need clear information and support, and you know you will not manage without help. Once you know you have the right help, you will be ready to take the next step.</p>
	<p>Your anxieties: You want to make sure your children are OK. You are worried that Jill/Greg's upset will spill out to the children. You want to make sure you do not go to Court. You need to make sure the business is valued. You would like Jill/Greg to move out of the house.</p>
	<p>What is most important to you: For your children to be happy in their relationship with both of you. To co-operate on parenting. To share the children's expenses fairly. A fair settlement. Recognition of your contributions, financial and otherwise. An ongoing friendship with Greg/Jill. To plan your own future, and not be held back or criticised.</p>
	<p>Looking at what you're struggling to let go: Feeling undervalued in your marriage. Your anger at the way you have been treated these last few years, and that Greg/Jill would not go to counselling. His/her family judging you. Regretting that you let him/her control your money. That my inheritance was spent on the house.</p>
	<p>Identifying the issues, you have to deal with: Parenting Plan. Children's expenses, including school fees. Re-housing. One of you leaving the business. Work options for the one who leaves the business. Sharing the self-managed superannuation fund.</p>

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	<p>Options for reaching your settlement: Based on your goals for how you want to separate, including save money, you will try to sit and have a conversation to work out a settlement. If that does not work, you will consider mediation or collaboration. You will give up a lot before going to court, as you do not want that.</p>
	<p>Immediate impact on your business and cash flow: As long as you can agree with Greg/Jill to retain your current salaries and drawings, it should be OK. You both have access to all accounts, and you have a good book keeper. There is cash in the business for legal fees and upcoming costs.</p>
	<p>Summary of legal information and advice: Your assets are safe, as all property is in joint names, bank accounts are pass worded and your mortgages are not able to be extended. You are paying/receiving child support, and are open to that being refined later on. You know you have a right/obligation to receive/pay spousal maintenance.</p>

PRIMARY CONCERN

You are facing the difficult decision to speak to Jill/Greg about wishing to separate, and we congratulate you on being prepared to do so as kindly and respectfully as possible.

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Priority Steps and Timelines

As we agreed that you would like to start by consulting with a counselling psychologist, we have included the contact details for Mary Jane Smith in this plan, along with a copy of the introduction email to her that we will send when you okay that step.

STEP 1: WITHIN 7 DAYS

STEP 1: Consult Mary Jane Smith for help in clarifying your decision, and speaking with Jill/Greg about it. T: 0400 338 830. E: mj@mjsmith.com.au. 2 High Street, Exton, Melbourne

STEP 2: WITHIN 7 DAYS

STEP 2: Have the conversation about separation, with Jill/Greg (link to tips from Dr Tina Sinclair in *Breaking Up Without Breaking Down*) after meeting with Mary Jane Smith and being guided by her about timing

STEP 3: WITHIN 7 DAYS

STEP 3: Invite Jill/Greg to meet with Mary Jane Smith, separately or together, to work out what it was that got your relationship to this point, and how to manage life and family as a separated couple

STEP 4: WITHIN 6 WEEKS

STEP 4: Within six weeks, return to Smart Separation, with Jill/Greg or alone to look at the process by which you can make your agreements, noting that your instincts are to find a co-operative process

The potential later actions to discuss at your Check-In may include:

1. Discussion with your accountant about how to prepare and share information about your business when the time is right
2. Obtain referrals from Smart Separation for practitioners who will help you to follow your chosen path to settlement
3. Have a preliminary discussion with a real estate agent and a vendor's advocate about selling your family home and maybe your investment property



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Notes

Your reminders for steps 1 and 4 have been sent to your Outlook calendar.

In your consultation, you decided that the 4 immediate steps are as much as you can manage now, and you feel it is appropriate to leave the other steps until the situation becomes clearer. We support that decision, and remain available for Check-Ins along the way.

You have been booked in for your next check-in with Smart Separation on 01/09/20. An invite has been sent to your outlook/Google Calendar.

Please let us know when the following email is to go to Mary Jane Smith.

