



CONSULTING PACKAGE- **Rules and Guidelines**

PACKAGE INCLUDES:

I. Weekly Meeting (30 Minutes)

The client is allowed up to four (4) weekly half-hour meetings via Zoom. Client is to schedule the meetings at once using the link provided. Meetings shall be the same day and time for each meeting to allow for as much continuity as possible.

The Client is responsible for making each meeting on time. The meeting will be canceled after ten (10) if the Client does not show up by then. The Client will forfeit this meeting except for Good Cause shown.

The Client is allowed to reschedule the meeting if at least 48-hour notice is given in advance. Any cancellations after this time will be considered a forfeit unless Good Cause is shown.

The Client is responsible for showing up prepared with questions, follow-up tasks, etc. as the meeting is to facilitate some progress in the Consulting relationship.

The Client shall not request legal advice as the Consultant is not permitted to give any legal advice. (However, if legal advice should be absolutely necessary, the Consultant has the discretion to seek the advice of an attorney and have that attorney communicate that directly to the Client.)

The Client may take notes during the meetings.

The meeting shall be recorded and provided to the Client when requested.

Should the meeting run over the half-hour time allotted, the Client will be billed in fifteen (15) minute increments for the overage. (The hourly rate shall be discounted from \$250 to \$225 for the Client.)

NOTE: If the Consultation package was customized to one-hour weekly meetings, then every phrase that states half-hour shall be modified to full-hour.)

The purpose of the meetings is to discuss Strategy in Client's case. This does not necessarily cover trials/hearings but the discussions can cover this if agreed upon at the time of signing the Agreement.

II. Strategic Action Plan ("Casemap")

The Consulting package includes a Strategic Action plan that will be provided to the Client within 7-10 business days AFTER signing and returning the Agreement.

This analysis will be the foundation for your path in your divorce or custody case. It is personalized for each Client and can be an unbelievably valuable asset for you no matter which phase of your case. It is usually anywhere between 5-10 pages, on average (it depends on the issues, the complexity, and the depth of your circumstances).

The Sections of the Casemap include:

- a. **Background**-this is all the information you provide (including court documents) that are pertinent to your case. Will also include current, past and future court appearance dates and their purpose.
- b. **Relief Sought**-this highlights what each side/party is asking for in court, with respect to custody or the divorce.
- c. **Documents Reviewed**-this section details the court documents (and possible evidence) that you noted in your permitted documents, that support your case or weakens the opposing parties.
- d. **Relevant Laws, Caselaw, etc.**-this part looks up the laws, statutes and/or case law that are relevant to the critical issues in your case. (What is included depends on the issues and the availability of relevant case law, statutes, etc.)

e. **Analysis**-this section is the most critical as it gives you a clear view of your case. It takes the supporting evidence, the weaknesses/strengths apply the relevant laws (and the exceptions), the best arguments based on these, and what you can do to position your case to increase your chances of getting desired outcomes. This will serve as a guide for you as you navigate each phase of your case. This section might need to be updated as things develop in your case, i.e. new claims, new petitions, Discovery, trial preparation, hearings, etc.

f. **Plan of Action** - this will give an idea of what next steps Client should take to meet their goals. Of course, things happen in a matter of seconds that can change the direction of divorce or custody, but this will serve to anticipate as much as possible to avert getting off track as much as possible.

NOTE: This Casemap is a shorter version of the one offered as a separate service. If you would like the more in-depth Casemap done, you can inquire about having that one done instead at a discounted rate.

III. Document Review

Client can submit specific documents to have them reviewed, interpreted, or analyzed as part of the package. Documents to be uploaded to Google Folder created by either party.

Permitted Documents:

Petitions/Complaints, Responses/Answers, Judge's Orders/Decisions, Discovery Requests, Attorney Letters/Correspondence, Parenting Plans/Agreements, or Court Notices.

NOT Permitted Documents:

Transcripts, Reports, Briefs, or any other document that is over 20 pages (unless agreed to by Consultant.)

Turnaround time for each document review is 3-7 days (as is the rules for all Doc Review services). The exact time will depend on the document type, Consultant schedule, calendared meetings, and urgency. (Check [here](#) for Step by Step Process for each service.)

IV. Document Preparation

Document preparation is on per case basis. There are limits with respect to which documents will be drafted. This will be discussed at the first weekly meeting.

Documents prepared are subject to the same rules as Document Review.

V. Attorney Referral

Client will have the opportunity to access the Consultant's Referral List which includes attorneys, mediators, coaches, therapists, and anyone else necessary to help client reach their goals. NOTE: Attorney fees are NOT included.

VI. Coaching/Consulting Platform

Client shall have access to the Simply Coach platform where notes, check-ins, resources, and library content are done. Access to the platform will be unlimited as long as the Client is in "Active" status.

All material on the platform is considered proprietary and thus shall not be shared with anyone outside of any of TDS programs.

ADMINISTERING SERVICES PROVIDED:

VII. Court Filings/Access

The package does not include any court filing, e-filing or document submission or document retrieval. However, if the Client wishes to have the Consultant perform any of these tasks, they can request these at any time (an additional fee might be incurred.)

The Client will provide the Consultant access to the court's portal account (if applicable) as soon as practicable. This is so that the Consultant can check on the status to be better informed with respect to implementing strategy.

If no account has been set up, the Consultant highly recommends that the Client set one up as soon as possible. (The Consultant will charge an additional fee to do this for the Client.)

VIII. Discounted Services

Clients can receive a discount of up to 20% on other services offered by TDS. This discount applies to Document Preparation, Document Review, Legal Research, Background Search (no Asset Searches), Uncontested Divorce (not the fees), and Forms/Templates.

EXCLUDES Strategic Action Plan (Casemap) unabridged version, Best Interests of the Child Analysis, and Trial Preparation.

NOTE: This does not apply to any exclusive offers, special rates, or sales.

IX. Modifications

Changes to any of these provisions might be made when necessary. Any material change will be given by advanced notice whenever possible.

X. Helpful Practical Information & Tips

1. Stick to the schedule, and calendar as much as possible. If you need to change, please give as much advance notice as possible as per the rules above.
2. Please limit contact and communication with the Consultant to the methods spelled out in the Agreement. **DO NOT SEND DM'S OR MESSAGES ON THE WEBSITE.**
3. Please post within inside the private Facebook Group before reaching out in any other format.
4. If you do NOT receive follow-up responses to your check-ins or requested work within the specified time, email me with the subject header **“LATE RESPONSE INQUIRY.”**
5. If there are any emergencies, for scheduled meetings especially, please email me with

the subject header
“EMERGENCY”.

6. You will get the most out of the Consulting service if you take advantage of all of the resources provided on the platform.

PLEASE ACKNOWLEDGE RECEIPT OF THESE RULES BY RESPONDING TO THE EMAIL.