

## Potential Client Questionnaire

Please Note: Attorney Iris McKay is available to take the following types of San Diego County family law cases only. All meetings are conducted by Zoom.

**-Divorce Mediator. As a Mediator, she meets with you and your spouse (and consulting attorneys when necessary) to help you resolve your case without needing to go before a judge.**

- Most clients have marital estates worth \$1M - \$15M. She works with a CDFA (Certified Divorce Financial Analyst) to keep your costs down and ensure accuracy of financial reporting and division.
- Flexible mediation terms allow for separate meetings, if requested. She specializes in cases involving spouses in alcohol or drug recovery, co-dependency, or other trauma/special circumstances. Clients' therapists or counselors can participate as requested by Clients. She does not require mental health professionals' involvement. (She does not practice Collaborative Law.)
- Mediation retainer is \$7,500. Hourly rate is \$450, with the goal of keeping the mediation fees within the retainer amount. Many of her clients have achieved this goal.
- Clients are advised to use independent consulting attorneys to participate in the process. Their fees and CDFA fees are not included in her retainer. Ethical referrals are available from Ms. McKay or clients may choose their own.

**-Consulting Attorney. As a Consulting Attorney, she can help you in two ways:**

**1) Divorce planning and education to understand your rights and obligations prior to a divorce being filed or 2) Advising you as to your rights and how they are being addressed in your Mediation—by advising you privately, as well as attending Mediation on your behalf. Also included are Second Opinion services if you are currently frustrated with an ongoing Mediation or Collaborative Law experience.**

- Planning and education Consulting clients pay as they go, purchasing time in one or two hourly blocks. One hour is \$450. Two hours \$900.
- Clients needing a Consulting Attorney for Mediation or Second Opinion services also pay as they go, purchasing time as needed to properly advise or assist them with the Mediation process, depending on their specific needs.
- Ms. McKay specializes in high net worth cases involving spouses in alcohol or drug recovery, co-dependency, or other trauma/special circumstances.

### Procedure to obtain an initial consultation

- 1) If you were referred **personally by a former client, attorney, financial advisor or mental health provider, please provide their name here** \_\_\_\_\_. If so, a 15 minute complimentary consultation will be provided.

- 2) Prior to scheduling the consultation, this questionnaire needs to be completed and emailed to [admin@irismckay.com](mailto:admin@irismckay.com) to conduct a conflict of interest check and to obtain a meeting time.

**PLEASE NOTE THAT ALL INFORMATION SUBMITTED IS KEPT CONFIDENTIAL.**

**Basic Information - mandatory**

Your Name \_\_\_\_\_ Email address: \_\_\_\_\_ Phone: \_\_\_\_\_

Your Spouse or Opposing Party's Name \_\_\_\_\_

Occupation/Employer \_\_\_\_\_

Is this concerning a family law matter in San Diego County? \_\_\_\_\_

Have any divorce or other legal papers been filed? \_\_\_\_\_ If Yes, please explain or include a PDF copy with your Questionnaire.

**Additional information**

1-Is Mediation an option for you and your spouse?  Yes  No  Not Sure

If you do **not** believe Mediation is an option, please explain why.

2-Please provide us with your 3 primary concerns (legal or otherwise) that you would like to discuss with Attorney McKay in your initial consultation.

Concern 1:

Concern 2:

Concern 3:

3-Please provide any background information that you believe will be helpful. The more that is understood about your concerns, the more efficient the consultation time will be. Use as much space as needed to explain your current situation.

4-Please include any other information you believe Attorney McKay should be aware of. This can include any special preferences, such as physical or mental health issues or other circumstances that would impact your legal case.

**When completed, please submit directly to [admin@irismckay.com](mailto:admin@irismckay.com) by attachment, via email. (We accept Word, PDF, JPG files).**

If you have any questions, please feel free to email me at [admin@irismckay.com](mailto:admin@irismckay.com).

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