THE ATTORNEY PARTNERSHIP CHECKLIST

KNOW WHAT PROTECTS YOU, WHAT STALLS YOUR CASE, AND HOW TO GET THE MOST FROM YOUR ATTORNEY

In this episode of We Chat Divorce, Karen Chellew and Catherine Shanahan sit down with Chicago family law attorney Jessica Marshall for a candid conversation about what really protects you during divorce — and where people often put themselves at risk without realizing it.

From our conversation with Attorney Jessica Marshall • Hosted by Karen Chellew & Catherine Shanahan

Hiring an attorney is the beginning of protection — not the whole of it. Use this checklist to evaluate your attorney relationship, walk in financially prepared, and use AI wisely (and safely) during your divorce.

SIGNS OF A HEALTHY ATTORNEY PARTNERSHIP

- [ ] You always know your next court date — and what happened at the last one.
- [ ] You hear about court outcomes right away, not weeks later.
- [ ] It feels like a partnership: you have input, not just updates.
- [ ] Your questions are welcomed, never treated as an offense.
- [ ] You're told when to bring in a financial professional — and why.
- [ ] Your attorney is honest about what's winnable and what isn't.

BEFORE YOU FIRE YOUR ATTORNEY, ASK YOURSELF

- [ ] **Is the case actually stalled by the other side?** Missing discovery from your spouse can stop everything — even with a great lawyer.
- [ ] **Have I given clear direction?** Attorneys work best when you're organized and financially clear about what you want.
- [ ] **Is this a communication problem or a competence problem?** One can be fixed with a reset call. Consider a joint call with your attorney and financial professional.
- [ ] **What's my pattern?** Fresh eyes can help a case — but several attorneys in a few months may signal it's time to look inward.

> Clarity is knowing what you have, what you don't have, what data is verified and what data is not verified — and then making the smart decision for yourself on which pathway to go down.
> — Catherine Shanahan, CDFA, Co-Founder of My Divorce Solution

ASK BEFORE YOU HIRE (OR RE-HIRE)

Communication style is one of the best predictors of a good fit. When interviewing an attorney, ask:

- How will I learn about court dates — and how quickly will I hear what happened in court?
- Do you see our work as a partnership? How much input will I have in decisions?
- How do you handle it when the other side stalls on discovery or won't respond?
- When do you recommend bringing in a financial professional, and will you do a joint call?

WALK IN FINANCIALLY PREPARED

Your attorney divides your assets — but in most states they can't give financial or tax advice, and you'll sign an acknowledgment saying so. Preparation is what turns their legal strategy into your best outcome. Before negotiations, know:

- [ ] Every account — and what type it is (cash, retirement, brokerage, equity, profit sharing).
- [ ] Your spouse's full compensation, including bonuses, equity, and employment benefits.
- [ ] The tax consequences of the accounts you'd receive in a division.
- [ ] The difference between liquid and non-liquid assets — and what you need.
- [ ] Your true lifestyle costs, documented — not guessed.
- [ ] Which of your numbers are verified by documents, and which are assumptions.

USING AI IN YOUR DIVORCE: DO & DON'T

DO

- Use AI to learn concepts and prepare smarter questions for your attorney.
- Bring what you find to your attorney and ask, “Is this right for my case?”
- Remember AI agrees with you by design — treat answers as leads, not facts.

DON’T

- File AI-drafted legal documents — fabricated citations have led to real sanctions.
- Type private case strategy into AI tools. A recent New York ruling treated AI chats as discoverable, like social media.
- Rely on AI valuations or “diagnoses” of your spouse as evidence in court.

GIVE YOUR ATTORNEY CLEAR DIRECTION — STARTING WITH FINANCIAL CLARITY.

The MDS Financial Portrait™ organizes and verifies your complete financial picture — assets, debts, income, and lifestyle — so you can walk into every conversation informed, confident, and ready to decide.

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