



moxie: *The ability to face difficulty with spirit.*

CUSTODY/PARENTING TIME EVALUATION CONTRACT

I agree to proceed with a custody evaluation/parenting time evaluation to be completed by:

Matthew Shore, MSW, LICSW

according to the following arrangements. I understand that the _____ County District Court has appointed Matthew Shore as an agent of the Court for this purpose. The terms of the agreement are as follows:

Purpose of this evaluation: I understand that the goal of a custody/parenting time evaluation is for the evaluator to provide impressions, evaluations, and recommendations from an objective and professional perspective as to the best interests of the child(ren) involved when the parents of that child cannot agree regarding custody and/or parenting time issues.

Fees for the evaluation: I understand that Matthew Shore's fee for conducting a custody/parenting time evaluation is \$275 per hour. Billing will be applied to all applicable services at \$275 per hour. For phone call and record review, there is a minimum charge of 12 minutes (.2 hours). This fee will apply to all time spent by Matthew Shore in conducting his evaluation and will include the time he spends interviewing, traveling, reading and reviewing files and other documents, correspondence, report preparation, consultation with other professionals (including attorneys), all phone conversations, home visits, court preparation, and any other time expended in direct association with this evaluation. I also understand that a one-time file setup fee of \$200 (\$100 per party) will be charged in order to begin work on the case. I agree to pay _____ % of all fees incurred by Mr. Shore with the understanding that the other parent of my child(ren) will pay _____ % of Mr. Shore's fees.

I understand that Matthew Shore requires a **\$4,000 retainer** to begin the evaluation and that all charges will be billed against this retainer. I understand that the final charge may be more or less than this retainer amount. I agree to pay Mr. Shore _____ % of the required \$4,000 retainer with the understanding that the other parent will pay the remaining _____ %. I understand that when the retainer reaches \$1,000, I will be asked to replenish that retainer to the original amount. I understand that a report (verbal or written) and recommendations will not be prepared or released until all fees have been paid in full. I understand that any unused portion of the retainer will be reimbursed upon verification that Mr. Shore's services will not be needed in the future (e.g. receipt of a Court order or stipulation). A minimum administrative charge of \$100 will be deducted from the retainer if the evaluation is not completed.

I understand that the source of payment for this evaluation does not influence the results or outcome of the evaluation.

Cooperation required: As a condition of this contract, I agree to cooperate with Matthew Shore in connection with this custody/parenting time evaluation. I understand that he may withdraw from performing this evaluation if I fail to cooperate. I agree to treat Mr. Shore and all other participants in this process with civility and respect and will refrain from engaging in threatening, coercive, or inappropriate behaviors that would be disruptive to the custody/parenting time evaluation process. I also agree to cooperate with Mr. Shore by providing him with the information that he reasonably believes to be necessary for the purposes of completing this evaluation, including (but not limited to) the following:

- **Interviews:** I understand that Matthew Shore may conduct interviews with me, with the other parent of my child(ren), with the children themselves (either together or separately), with new spouses, or with other people that play significant roles in the lives of the child(ren) involved. I agree to cooperate with any such interviews with the understanding that these may take place at Moxie Inc., in my home or workplace, or at some other appropriate site selected by Mr. Shore. I understand that Mr. Shore's evaluation may include at least one home visit with each of the parents and child(ren) involved in this evaluation.
- **Collateral Information:** I understand that Matthew Shore may need to contact various people who have knowledge of me, my parenting, and/or my child(ren) –such as teachers, daycare providers, counselors, pastors, healthcare providers, law enforcement agencies, and other third parties. I understand that Mr. Shore may also wish to contact my neighbors, relatives and friends. I will identify these people if requested to do so by Mr. Shore and agree to sign authorizations allowing for the release of information from the individuals and collateral sources identified by my evaluator.
- **Chemical Health/Mental Health assessments:** I understand that if Matthew Shore determines that more information is needed about me or my child(ren) in the form of assessments or testing for chemical health or mental health, he will recommend specific professionals other than himself to complete those assessments. I understand that it is common practice for both parents to complete psychological assessments – typically including the MMPI-2 – as part of the course of regular information gathering. The costs for these additional assessments will be separate and above the fee for the custody/parenting time evaluation and will be negotiated independently with the selected assessor. I agree to sign authorizations allowing for the release of information so that the results of the requested assessments are ultimately provided to Mr. Shore.

Review of findings and report: I understand that when Matthew Shore completes his interviews and collection of data, he may contact the attorneys involved in this matter for purposes of scheduling a conference to discuss his impressions and recommendations. Both attorneys and Mr. Shore may previously agree to the parties' presence during the feedback session. If such a conference occurs, the attorneys in this case will be given an opportunity to ask some limited questions and/or engage in preliminary negotiations about possible settlement of any custody/parenting time issues involved. Time used in preparation for and during this meeting will be billed at the standard hourly rate. I understand that feedback and recommendations will not be prepared or shared until all fees have been paid and there are sufficient retainer funds for the feedback meeting and preparation time (2-hour feedback meeting and 5 hours of preparation time).

I understand that following this meeting, my attorney will be requested by Matthew Shore to discuss his findings and recommendations with me. I understand that if a settlement of any custody/parenting time issues is not achieved subsequent to this process, Matthew Shore will prepare a final written report regarding his findings, recommendations, and the basis for his recommendations. I understand that an additional \$4,000 retainer will be required for 20 hours to prepare a written report. I understand that the final charge for the report may be more or less than this deposit amount.

I understand and agree that copies of this report will be provided to the attorneys on both sides in this matter. I understand that Matthew Shore generally will not discuss his findings and recommendations with the parties once the report is issued. I also understand that Mr. Shore's final report will not be issued until all fees in connection with this evaluation have been paid.

Cancellation fees/no-show policy: I understand that if I cancel an appointment with Mr. Shore with less than one full business day's notice, I will be charged the amount of \$550, representing the cost of the full 2-hour appointment time. I understand and agree that if I cancel an appointment with more than one but less than two full business days' notice, I will be charged \$275, or one-half of the 2-hour appointment time. I understand that there will not be any charges or cancellation fees for appointments that are cancelled with more than two full business days' notice. I understand that all charges and cancellation fees for missed appointments and late cancellations will be paid exclusively by the person who misses and/or cancels the appointment. A session is considered missed if the party has not arrived 20 minutes after the start of the session.

Trust Account: All client deposits will be held in a separate trust account. Funds in this account are not earned by Moxie Inc. until services are rendered. Once services are rendered, funds will be drawn from the deposit and transferred out of the trust account. Any remaining balance will be refunded at the conclusion of the evaluation.

Conversations/consultation with other providers: Matthew Shore may occasionally find it useful and beneficial to consult with other professionals in the field for purposes of case consultation. These other professionals are legally bound to keep any information provided to them confidential. During these consultations, however, Mr. Shore will not reveal the identities of the clients involved. These types of consultations will be noted in the evaluation file. With the understanding that Mr. Shore will not reveal my identity without express authorization to do so, I consent to such consultation by him.

Court appointment as a condition of this evaluation: I understand and agree that Matthew Shore will not perform a custody/parenting time evaluation until the Court with the jurisdiction in my case issues an order appointing him as a custody or parenting time evaluator.

Signed contracts by both parties are a condition of this evaluation: I understand that Matthew Shore will not begin or perform a custody/parenting time evaluation until both parents of the child(ren) involved have signed a custody/parenting time evaluation contract and the initial retainer is paid in full.

Miscellaneous Expenses: Expenses incurred by Matthew Shore for miscellaneous case related items (e.g. records requests, file copying, postage, etc) will be billed against the retainer.

Appearances: I understand that Matthew Shore will testify regarding his findings and recommendations only under subpoena. I understand and agree that Mr. Shore's fee for a Court appearance or deposition is \$300 per hour. In the event that Mr. Shore is subpoenaed to testify, the party issuing the subpoena is required to pay a deposit of \$3,600 (8-hour day plus 4 hours of preparation time at \$300 per hour). There is a half-day minimum charge (a half-day is defined as 8:00 am to 12:00 pm or 12:00 pm to 4:00 pm). To ensure Mr. Shore's availability, the subpoena and a check for \$3,600 must be provided to Moxie Inc. no later than five full business days prior to the Court date. As much advance notice as possible is greatly appreciated. Subsequent cancellation of the Court appearance will result in forfeiture of the deposit.

Mandated Reporter: I understand that, as an MSW, Matthew Shore is considered by state law to be a mandated reporter. He is therefore obligated to report to the proper authorities any evidence of physical or sexual abuse or neglect of minors, elders, or vulnerable adults; or any direct threat to harm oneself or another person.

Case Manager/Assistant: Matthew Shore may utilize a case manager or assistant to manage communication, gather information, draft documents or complete other tasks. The case manager/assistant will not have the authority to make decisions but may assist with negotiations. The work of the case manager/assistant will be billed at \$150 per hour.

CONFIDENTIALITY

I understand that the information that Matthew Shore requires from me is for the purpose of a custody/parenting time evaluation. I understand and agree that the information I have provided him may be used in his evaluation, recommendations, and report – which in turn will be provided to the parties, the attorneys, and, potentially, the Court – and, to that extent, I understand that the information I provide to Mr. Shore will not be considered confidential.

I have received and read a copy of this contract, and I have discussed the provisions of this contract with my attorney.

Signed: _____

Date: _____

Parent of: _____