How can a Certified Divorce Financial Analyst® help you?

A CDFA® professional is your go-to financial expert in the divorce process. We are trained to advise you on the following:

- Marital vs. Non-Marital Property
- Dividing a Marital Home and Other Real Estate
- Real Cost of Divorce
- Valuation and Division of Assets
- Retirement Plans and Pensions
- Executive Compensation Division
- Tax Issues and Solutions
- Creative Divorce Financial Planning for Primary Bread Winner
- Short and Long-term Financial Impacts of Different Settlement Proposals

What We Do

We help women going through a divorce to avoid costly mistakes using our **P.E.A.C.E.**TM method so they achieve a more equitable settlement and sleep well at night.



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Your Divorce Money Matters is Our Business



DIVORCE and POST-DIVORCE FINANCIAL PLANNING SERVICES

Make an appointment with our CDFA® professional today!

Be Family I

Our Services



DURING DIVORCE

- Analyze assets and liabilities
- Review current/future expenses and budget
- Prepare Financial Affidavit
- Analyze historic lifestyle
- Fix financial data errors and inconsistencies
- Trace marital and separate property
- Analyze marital debts
- Identify hidden and unreported assets
- Review financial and tax implications of assets support or sale
- Analyze cost basis for marital and separate assets
- Evaluate retirement plans
- Review of executive compensation (RSUs, NQSO, ISOs, ESPP)
- Review proposed settlement agreement for financial issues and adverse tax consequences

Benefits for Family Law Attorneys



- We are your financial paralegal and a resource for financial topics
- We are your extra pair of eyes to keep your clients on track
- We help your clients understand short and long-term impact of their financial settlement
- We reduce your liability by having in-depth financial research to support your case
 - We help you grow your practice

Our Services



POST-DIVORCE

- Execute and monitor assets division and transfer according to a settlement
- Close accounts in joint names and monitor till complete
- Open new accounts into which funds can be transferred
- Ensure that documents to split retirement plans are filed with a court and accepted by a plan administrator
- Establish a post-divorce cash flow and budget management plan
- Design a comprehensive investment strategy based on individual financial goals
- Manage income and investments, monitor results, update plans
- Establish new insurance, and estate plans