

Your Financial Fresh Start

A Post-Divorce Wealth Guide for High-Net-Worth Women

Divorce marks a major life transition and a powerful opportunity to rebuild your financial future with clarity and confidence. My goal is to help preserve what you've built, understand your new financial landscape, and create a strategy that supports the life you want next.

1. Immediate Stability

Organize & clarify your new financial picture:

- Review your divorce decree, settlement terms, QDROs, and trust documents
- Create a simplified overview of your assets and accounts
- Identify urgent financial decisions and risks

Preserve your financial security:

- Help you separate or retitle accounts
- Close joint credit lines and secure personal access
- Review credit reports and strengthen digital security

You walk away with:

A clear, organized understanding of where you stand.

2. Realign Your Assets and Goals

Cash Flow & Lifestyle Planning:

- Map and explain your new income sources
- Build a 12 to 24 month liquidity plan
- Align spending with your lifestyle and priorities

Investment Strategy Reconstruction:

- Review and explain your investment holdings
- Assess risk, growth potential, and tax implications
- Rebuild a portfolio aligned with *your* goals
- Manage complex assets such as:
 - Private equity
 - Hedge funds
 - Restricted stock
 - Business interests
 - Real estate portfolios

Real Estate & Business Analysis:

- Evaluate whether to keep or sell properties
- Review rental income, mortgage structure, and tax consequences
- Update business ownership records and income flows

You walk away with:

A modern, independent financial foundation designed around *your life* — not your former household.

3. [Preserve Your Wealth for Years to Come](#)

Comprehensive Estate Planning Strategies (in coordination with your attorney):

- Update wills, trusts, beneficiaries, and powers of attorney
- Rebuild or revise trust structures
- Plan for multigenerational wealth

Tax Strategy & Coordination:

- Partner with your CPA to optimize your tax picture
- Evaluate capital gains, business income, and investment taxation
- Explore tax-smart gifting and charitable strategies

Philanthropy & Social Impact:

- Evaluate donor-advised funds, foundations, or legacy giving
- Align charitable strategies with your values and vision

You walk away with:

A long-term plan that helps protect you, supports your family, and reflects the future you want to create.

4. [Emotional & Behavioral Guidance](#)

Support You Can Feel — Not Just See in Your Accounts

Divorce impacts financial decisions and emotional well-being.

My role includes helping you navigate:

- Loss aversion around homes or sentimental assets
- Decision fatigue during transition
- Anchoring to old lifestyle numbers
- Confidence gaps around investing
- Overspending or avoidance during emotional moments

How I support you:

- Clear, jargon-free explanations
- Decision-making frameworks
- Thoughtful pacing — no overwhelm
- Education that empowers, not intimidates

Your Partner in Building What Comes Next

You deserve a financial future that reflects your strength, independence, and vision.

My commitment is simple:

To help you feel organized, supported, and in control — every step of the way.

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