

Working with a Certified Divorce Financial Analyst (CDFA®)

As a Certified Divorce Financial Analyst (CDFA®), I provide financial guidance to individuals facing divorce, and their attorney, through all stages of the divorce process. In addition to my strong investment planning background and CFP® certification, I've completed an intensive training program to become skilled in analyzing and providing knowledge regarding the financial issues of divorce. As a Certified Divorce Financial Analyst, I will help you:

- Identify the short-term and long-term effects of dividing property
- Work with your CPA on tax issues
- Review pension and retirement plan issues
- Determine when it makes sense to keep the matrimonial home—or provide recommendations on housing options
- Evaluate insurance options to protect your family
- Figure out how inflation will play a role in determining your settlement
- Bring an innovative and creative approach to divorce cases
- Clearly explain difficult concepts and settlement options so you understand the financial implications

At this complex time, trust a professional with experience to help take the weight off your shoulders. I help you maintain financial security today and in the future. As an experienced investment professional who specializes in navigating life's transitions, I provide clarity on the critical financial issues that arise when individuals are newly single.

I help them manage financial decisions and, together, we will define their new life goals, risk tolerance and time horizon. With a deep understanding of their situation, I'll assess their total financial picture to develop a comprehensive strategy that covers all wealth management needs.

I help you make informed decisions today to build your post-divorce financial future.

Wells Fargo Advisors Financial Network is not a legal or tax advisor.

The use of the CDFA® designation does not permit Wells Fargo Advisors or its Financial Advisors to provide legal advice, nor is it meant to imply that the firm or its associates are acting as experts in this field.

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What is a Certified Divorce Financial Analyst® (CDFA®)

A CDFA® professional is a financial professional skilled at analyzing data and providing expertise on the financial issues of divorce. Through the financial analysis process, a CDFA® professional can help you think through the real cost of divorce and develop a realistic picture of your financial situation as they transition to a new lifestyle.



How can a CDFA® professional help?

I help you address the special financial issues of divorce with data that can help achieve equitable settlements. The role of the CDFA® professional is to assist you and your attorney to understand how the decisions you make today will impact your financial future.

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