

The Role of a CDFA

Since divorce involves many financial issues, it makes sense to have a Certified Divorce Financial Analyst™ (CDFA™) as part of your team. By providing expertise relating to the financial details of your divorce, we can tailor our services to help you obtain a more in-depth understanding of your financial options.

Services include:

- Educate you regarding financial matters relating to your divorce
- Work with you (and your attorney or mediator) to draw up budgets that demonstrate your income and expenses, along with appropriate levels of support
- Help with determining the short and long-term financial impact of proposed settlements
- Create personalized reports and graphs that illustrate various property division scenarios, cash flow projections, support amounts, etc.
- Help address specific challenges, such as loss of health, life or disability coverage and retirement plan benefits

You will benefit by:

- Having a clearer understanding of your financial particulars so that you can make informed, educated decisions regarding issues such as:
 - Can I/Should I keep the house?
 - What are the pros and cons of exchanging certain assets (i.e., trading the pension for the retirement accounts)?
 - Will I be able to support myself when spousal and/or child support ends?
 - How should we handle the stock options, deferred compensation and other types of employer sponsored plans?
- Having someone who can work with you through each step of the divorce process
- Hearing an objective viewpoint in an emotional situation
- Being better prepared to take charge of your financial future

California life, health and long-term care insurance licensed (0C21994).

Robert W. Baird & Co. does not provide tax or legal services, but is prepared to work with your tax professional and legal counsel.