

Divorce Settlement Planning

Divorce is extremely painful in many respects. Financial survival can be quite challenging, and requires careful analysis **prior** to the divorce with diligent follow-through **after** the divorce.

Due to potential conflicts of interest, Transition Planning, Inc. will only contract with one of the parties to provide the following services during these two distinct phases of the divorce process:

Phase 1 – Pre-Divorce Process

- Review financial statements
 - Net Worth
 - Asset Ownership Arrangements
 - Beneficiary Designations
 - Income Sources and Amounts
 - Insurance Coverage
 - Medical
 - Disability Income
 - Life Insurance
- Create income and expenses projections
- Examine the proposed division of assets
- Evaluate tax considerations
- Discuss child support/maintenance needs
- Develop illustrations of possible disparities in settlement options
- Identify several equitable economic solutions

Phase 2 – Post-Divorce Follow-through

- Update financial statements
 - Net Worth
 - Asset Ownership Arrangements
 - Beneficiary Designations
 - Income Sources and Amounts

- Insurance Coverage
 - Medical
 - Disability Income
 - Life Insurance
- Update income and expenses projections
- Verify Updated Ownership Arrangements
- Verify Updated Beneficiary Designations
- Verify child support/maintenance funding
- Discuss Values-based Goals (Who and What is important to you, and Why?)
- Summarize Prioritized Goals with
 - Time Frame
 - Money Needed
- Determine the feasibility of achieving outlined goals
- Determine existing Portfolio Asset Allocation
- Complete FinaMetrica Risk Profile
- Propose an appropriate Investment Policy Statement

Without careful planning, it can take a long time to recover from this event, if ever. Be wise. Improve your chance of a more equitable outcome by engaging our services. Get started today by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time.

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

We look forward to hearing from you soon!