DIVORCE PLANNING

WILLIAMS WEALTH
MANAGEMENT

A Member of Advisory Services Network, LLC

Professional Support

It is important to consider engaging a financial advisor when going through the divorce process. If there is a current financial advisor for the couple, he or she may have a relationship primarily with the other spouse. While it is possible to maintain that relationship, it comes with potential conflicts.

Seeking a new, objective third-party, ideally one with experience in the divorce process and an understanding of its complexities, provides valuable support, guidance, and insight.

The First Step

If you have not already done so with legal counsel, gather all financial information and discuss various settlement scenarios. This work will help envision life after the divorce from a financial perspective. Some of the services that a divorce planning advisor might provide are:

- Asset division
- Potential income scenarios
- Helping to assess the marital and single standard of living
- Exploring financial projections based on proposed settlements
- Assisting in organizing financial information in one place
- Coordinating with and supporting communication with attorneys and other professionals

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Divorce Planning for a Fee

Quarterly or annual fee. We understand the timing of payments may be delayed due to the settlement process and privacy.

- Asset Division and financial negotiation assistance
- Personal financial planning – goal setting, "what if" scenarios in divorce outcomes, savings plan, tax planning, income projections, retirement planning, insurance planning, estate planning, investment planning
- Monthly calls/meetings during process

*(Professional referrals are not affiliated with Williams Wealth Management or Advisory Services Network, LLC. There is no compensation exchanged between any professional referral and Williams Wealth Management.)

Referrals

Referrals to other professional relationships to assist in the process and needs during and after divorce.*

- Family law specialist
- Tax planners / CPA
- Mortgage Lenders – CDLP® (Certified Divorce Lending Specialists) and banking services
- Estate planner
- Insurance (life, property & casualty)
- Wellbeing specialists:
  - Therapist
  - Personal Transition Coach
  - Health & Wellbeing

Platform: eMoney

If you have not already done so with legal counsel, gather all financial information and discuss various settlement scenarios.

Start with an introductory call or meeting

What to discuss:

- Stage of divorce process
- Intended outcome financially (if known)
- Desired living arrangements
- Idea of individual expenses

BOOK NOW

calendly.com/brandon-626/30-minute-call-brandon

Book a one-on-one planning meeting

What to bring to meeting, if available:

- Financial Declaration from divorce
- Current portfolio statements
- W2, if applicable
- Most recent joint tax return
- Current individual living expenses (monthly)

BOOK NOW

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