RICHARD HENDRY

DIVORCE FINANCIAL PLANNING

How would you like to simplify the tedious aspect of the financial settlement assessment for your divorce? We provide you the Divorce Financial Planning expertise to help with your settlement at a reasonable cost. Here is how the process works and the benefits to you.

Steps to Implement

- We meet with you and start to gather financial affidavit information at which time we conduct an in depth interview with you to assess what your long term goals and needs are during and post divorce.
- We work hand in hand with your attorney to help expedite your case. We provide to your attorney all the financial affidavits and asset summaries to streamline your contact with them to keep costs to a minimum. We will copy all documents that we need and return all originals to you.
- We will meet with you on an ongoing basis to fine tune your settlement offer and provide to your lawyer 2-3 financial scenarios for your divorce settlement.
- Our billing rate providing pre-divorce advisory services is $100 an hour with a $750 deposit. (Hourly rate can be waived for Post Divorce work)

Benefits to our Clients

- We simplify and streamline your divorce case to reduce overall fees paid for divorces.
- We work with our clients post divorce to help execute your divorce settlement.
- We follow through on QDROs to receive 401k and future pension benefits.
- We help provide a valuable resource in helping you get through a difficult time in making proper financial decisions that is based on facts not emotion.

Pre-Divorce Settlement Services

- Prepare Financial Affidavit
- Spreadsheet assets for division
- Child support and alimony recommendations
- Possible 2-3 settlement options with summarized breakdown for negotiation

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Post Divorce Services

- Follow up of QDRO & 401k spousal transfer to IRA account.
- Investment account re-titling of taxable accounts.
- Transfer of company pension benefits from spouse's account.
- Helping to re-finance of current mortgage to client's single name only.
- Set up of new Term Life Insurance designed to protect divorce settlement agreement.
- Set up of Children's education accounts.
- Post- divorce investment portfolio allocations & income planning.
- Beneficiary updates & changes for Wills, Trusts, & Investment accounts.
- Set up new health & dental care coverage for client and children.*
- Help client find new automobile, homeowners, or renter's insurance.
- Set up Disability & Long Term Care coverage for client.

Who is a good Fit for our Services?

- Individuals whom have never handled the finances during their marriage.
- Individuals whom are over 50 years old and need solutions to providing income post divorce.
- Individuals whom need someone they can trust to help them make good sound financial decisions post divorce.
- Individuals whom have significant equity in their home.
- Individuals needing a QDRO to be followed up for retirement assets.
- Individuals with multiple investment and bank accounts to divide.

Our entire firm is committed to helping you achieve the best financial results during and after your divorce settlement. Please give Richard Hendry a call at 678-578-2430 or email us at rich.hendry@raymondjames.com. Visit us at www.richardhendry.net.

Sincerely,

Richard P Hendry, CDFA
Registered Principal, RJFS

**These services are not affiliated with Raymond James Financial Services, Inc.*

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