RICHARD HENDRY

DIVORCE FINANCIAL PLANNING

How would you like to simplify your family law practice by outsourcing the tedious aspect of the financial settlement assessment? We provide to you and your clients the Divorce Financial Planning expertise to help with your client's settlement at a reasonable cost. Here is how the process works, the benefits to you and the services provided to your clients.

Steps to Implement

- You meet with your client and start to gather financial affidavit information at which time you would call us to conduct an in depth interview with your client to assess what their long term goals and needs are during and post divorce.
- We send a courier to your office to pick up and return all relevant financial discovery in the case. We will copy all documents we need and return all originals to you.
- We will meet with the client to establish rapport, gather information, and assess individual needs. Then we provide the lawyer with 2-3 financial scenarios for divorce settlement.
- Our billing rate for pre-divorce advisory services is $100 an hour with a $750 retainer.

Benefits to Your Office

- We simplify and streamline your practice to handle more cases earning more billable hours
- We refer clients back to you that still need help post divorce.
- We follow through on QDROs to insure compliance and avoid malpractice claims.
- We make you look good by providing sound financial strategies for settlement and negotiations.
- You can focus on the work that you enjoy and not the tedious number crunching and paper pushing

Pre-Divorce Settlement Services

- Preparing of 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?

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

Our entire firm is committed to helping your practice and clients achieve the best financial results during and after the 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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