

COLLABORATIVE DIVORCE SOLUTIONS

Terri McDougall, PFP, CFDS www.collaborativedivorcesolutions.ca (416)799-7861

Financial Divorce Planning Services

In this increasingly complex world, a financial professional makes sense to assist in the divorce process. Whether you choose the traditional divorce model, mediation or collaboration, we can help. We offer a complimentary initial consultation to help understand the divorce process, financial disclosure requirements, and options available.

At Collaborative Divorce Solutions, we offer the following services:

SEPARATION ASSISTANCE

- Assist with financial data collection and interpretation
- Preparation of draft Net Family Property Statements, Financial Statements and Certificates of Financial Disclosure
- Review of retirement plans, pensions, investments, insurance and debt
- Calculation of child and spousal support, and Equalization Payments
- Budgeting and cash flow analysis
- Projections of settlement proposals, reflecting future income and net worth calculations; present alternative options, and review implications of each
- Source actuaries and appraisers
- Help in prioritizing financial interests and establishing goals
- Help improve clients' financial knowledge and comfort through education and guidance

POST-DIVORCE SERVICES

Provide expert guidance for future financial affairs:

- Assist with transfer of registered assets
- Review life insurance needs
- Source new mortgage and credit facilities
- Make appropriate professional referrals for tax, financial and investment advisors
- Provide follow-up to ensure implementation of financial decisions

Adding a Financial Professional makes sense when:

- You are feeling overwhelmed with addressing your finances
- You would like to get your financial documents in order prior to initiating the legal process
- Financial affairs are complex or unorganized, or one spouse is more financially savvy
- Emotions are riding high and may force decision-making; you can't determine which is the best settlement option for you

Contact us for a consultation to see how we can assist at:
info@collaborativedivorcesolutions.ca or (416)799-7861