

BUILDING YOUR TEAM OF EXPERTS



Who do you need on your team and why?

1 FAMILY LAW ATTORNEY

- Ask friends who have gone through the divorce process for referrals
- Make appointment with attorney regardless if you are ready to file yet, know your options ASAP
- Take a friend with you to take notes
- Attorney may suggest a forensic CPA depending on your situation

2 FINANCIAL ADVISOR

- Cash Flow planning, help you determine what you can spend after divorce
- Invest your assets in a diversified, risk appropriate portfolio to meet your life time income goals
- Simplify and coordinate everything in your financial life
- Walk you through the steps of divorce and help you make good financial decisions along the way

3 CPA

- File personal tax returns going forward
- Estimated tax payments
- IRA Minimum Distributions
- Tax reduction strategies

4 TRUST & ESTATE ATTORNEY

- Amend Will and Trusts if applicable
- Revoke and update your Power of Attorney
- Revoke and update your Durable Health Care Power of Attorney

5 FRIEND OR FAMILY MEMBER

- Someone to take notes, emotions can comprise remembering details
- Someone to be a sounding board
- Select someone who can have tough conversation with you when needed



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If you would like to have a confidential conversation and learn more about how **SignatureWOMEN** can possibly be of help, please reach out to **Jamie McCusker Gentry** at Jamie.Gentry@SignatureFD.com, **Victoria Shackley** at Vicki.Shackley@SignatureFD.com, or **Clara C. Parris** at Clara.Parris@SignatureFD.com.

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