



Brett Jensen, CDFA®
CURRICULUM VITAE

POSITIONS

- Mediator, AJW Financial Inc., (2009 to Present)

PROFESSIONAL EXPERIENCE

- Neutral guidance for married couples working through collaborative divorce and mediation.
- Non-neutral guidance for individual's going through divorce.
- Financial projections and forecasts to illustrate divorce settlement proposals.
- Analysis of tax and cash flow scenarios due to effects of income, spousal maintenance, and child support.
- Collaboration with client's attorneys, accountants, realtors, and mortgage brokers.
- Preparation of customized financial plans, including cash flow, tax projections, estate planning, retirement estimates, and education funding.
- Integration of life, disability, medical, and long-term care insurance into client's risk management program.
- Coaching of clients in their goal setting and life-planning decisions.
- Education of clients in all aspects of their finances to promote informed decisions.
- Research of advanced financial planning topics.
- 20 years + experience with QuickBooks, Quicken and other accounting software
- Internal accountant for AJW Financial, Inc.

EDUCATION

- Certified Divorce Financial Analyst Program, The Institute for Divorce Financial Analysts, 2012
- Family Mediation Training, 2016
- CompTia Network + training, 2010

PROFESSIONAL CREDENTIALS AND MEMBERSHIPS

- Certified Divorce Financial Analyst®, (CDFA)® 2012
- Family Mediation Training, 2016
- Series 7, General Securities Representative, 2016
- Series 66, Uniform Combined State Law registration, 2016
- Microsoft Office Specialist (MOS) certification, 2011
- Collaborative Law Institute Treasurer

RECENT PRESENTATIONS & TRAININGS

Speaker/Trainer, *Up Your Financial Game Plan*, Full Day Training Camp, 2016 to present