

LIFE SPANS

THE BRIDGE DIVORCE STRATEGIES NEWSLETTER

INTERESTING INFO YOU CAN READ OVER A SINGLE CUP OF COFFEE!

IN THIS ISSUE:

- Timing is everything
- An exciting new offer for you
- There is such a thing as a free lunch
- What?? Cheat on your clients' taxes??



JULIE KERN, CPA, CFP®, CDFIA®

TIMING IS EVERYTHING

I'm going to stick my neck out here and offer you something entirely free, something you're guaranteed to find incredibly valuable, which will make you look like (even more of) a hero to your clients, with absolutely no obligation to engage me or my services whatsoever.

But first, let me tell you a little story. It will set up the offer I've just teased. Indeed, it's the impetus behind this offer.

Let me explain.

There's an FAQ on the attorneys side of my website which asks: "When and how early should I include you in a case?" The answer, you won't be shocked to learn, is "As early as possible."

But should you even engage me in the first place, let alone "early"?

Many attorneys assume that I'm not needed. That they can handle this themselves. Until they can't. And then it's often really late in the process, with lots of information needed, and not a lot of time to process it. And that's if you can wrestle it from the other party. So. This month's Jane Doe is amicably divorcing after her husband of 20-odd years filed for it. It's a big case; there are millions at stake.

And here's just one sliver. When they married, the husband had an IRA worth about \$100k. In his settlement offer, he now valued it at over half a million dollars.

What?? This was the attorney's uh-oh moment. That didn't look right. Might there be other issues flying under the radar?

And so I was called in. Under NDA, I looked at the husband's documents. And I saw some interesting things:

- He wanted to carve out a big chunk of his deferred compensation, since it was deposited after the separation. But—surprise, surprise—it was based on income he'd earned during the marriage.
- That simple IRA got rolled over to a different financial custodian during the marriage. He then added funds to it. And yet, where are all the statements? There was a big "donut hole" of missing contributions. And now, of course, with the clock ticking toward the litigation date, the husband is pulling a Stonewall Jackson on us. Which is odd, considering he works in financial services.... and doesn't know how to get statements?
- His calculated "internal rate of return" didn't take into account additions to the portfolio over time. In other words, he was making his calculations based on the wrong metric. This didn't exactly benefit Jane.

Are your eyes glazing over yet? Good. They should be. This isn't "law." This is "CPA in the weeds."

And here's the thing. All of this stuff had been sitting on the attorney's desk for ages. And now the court date was looming. Yet I could see, at a glance, that this paperwork was full of holes.

And thus, my exciting offer to you:

A Red-Flag Review

For a limited time, I'd like to offer you, absolutely free and with zero obligation, 30 minutes of my expertise in which I will look at any proposed settlement you may have, and give it my professional sniff-test. I can see this stuff real fast. And if I find red flags, as I often do, you can return to your client and say, "I ran this past my financial expert and she saw some issues with this." So you go from hero to super-hero, and your client can get better negotiating leverage.

And then, if you and your client think you'd like to actually engage me for my services, we can talk. I earn my reputation on ROI, and I think that this little loss-leader of mine will show you just how important timing can be.

So contact my office to book your "Red-Flag Review." You send your docs, I'll take a look at them, and give you up to 30 minutes of my time, gratis, on the phone. If you'd like me to sign your NDA in advance, I'd be happy to. What are you waiting for?

FIND US AT:

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THERE REALLY IS A FREE LUNCH

Given today's Covid-19 environment, we are now offering online CLE, and will order lunch for the attorneys in your office who would like to participate from their remote locations. What a tasty way to learn things about the financial side of divorce that fly under your radar—and help you earn from one to three hours of CLE credit in the process!

Simply give us a call at (480) 378-2383 (or send an email to carma.hall@bridgefinancialstrategies.com) and say, "Hey! We'd love to take you up on that ingenious remote lunch-and-learn opportunity!" There's no obligation. Call us today!

WHAT?? CHEAT ON YOUR CLIENTS' TAXES??

Okay, I was purposely being cute here. Of course I'm not advocating that anyone cheat on anyone's taxes. But I would like to offer you a taxes-in-divorce cheat sheet, absolutely free. It's our latest 2021 edition, a handy little card you can keep in your desk drawer to help you with some quick, basic info about all kinds of important financial facts that pertain to divorce.

Want a copy? I'll be happy to send you one. Simply give us a call at (480) 378-2383 (or send an email to carma.hall@bridgefinancialstrategies.com). Go for it!

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