Your Divorce Process at Shepherd Financial Partners.

At Shepherd Financial Partners, it is our belief that a deep understanding of an individual's situation is the cornerstone to delivering effective financial advice. When it comes to divorce, Mark Shepherd, CDFA® and his divorce team work with you to understand your unique situation and guide you through the divorce process.

Our Divorce Planning Team:


R. Mark Shepherd CFP®


Gigi Barnabei, RP®


Steven Kuhlman CPWA®

Our Divorce Planning Steps:

1. **Initial consultation:** Our first step is an initial consultation where we get to know you and your current situation. We want to understand your challenges and the hurdles that confront you as you navigate divorce. This will be the starting point for our relationship.

2. **Recommendations:** We begin a thorough review of your family experience and financial state of affairs. We educate you in the decision-making process of divorce and provide recommendations on topics such as:
   - Alimony, child support, living arrangement affordability, and the division of assets.
   - Complex income situations and asset holdings.
   - Changes in tax status and additional tax consequences of divorce.
   - Behavioral aspects of divorce and the impact on your family.

3. **Financial analysis:** We prepare and present a financial analysis providing the detailed information you will need to make clear decisions and understand their lasting impact. In addition to providing you with an understand of your pre and post-divorce lifestyle, this information can be shared with your divorce team to provide a baseline for discussion and assist with negotiations.

4. **Financial advocacy:** During negotiations, we serve as your financial advocate providing guidance and assisting with the evaluation of settlement terms.

5. **Financial advisory services:** Once you begin your new chapter after divorce, we would be honored to serve as your trusted financial advisory firm. As part of our post-divorce services, we work with you to provide:

- Wealth portfolio strategy and implementation: portfolios aligned towards your near and long-term goals within a risk-adjusted profile.
- Divorce decree oversight: annual reviews including a review of settlement terms and alimony true-up based on wage information.
- Our Shepherd Living Plan: a financial plan providing a projection of your financial well-being, net worth and cash flow. "What if" scenarios provide guidance on the benefits and consequences of life-style changes.
- Tax planning & wealth transition services: exploration of estate planning goals and guidance on tax planning, wealth distribution, and estate planning structures.

Call us today to begin planning for your tomorrow.

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