

Topics include:

- Depositions, Interrogatories, and Building a Trial Book
- Dividing the Retirement Benefits
- The Family Business in Divorce
- Forensic Engagements in Divorce
- Financial Analysis for Divorce

Cost: \$895 per person; \$795 for CDFA members
Hotel: Sheraton Gunter San Antonio
205 E. Houston Street San Antonio TX 78205
Conference Special Room Rate: \$139
(Mention IDFA as the group code to receive this rate)
Reservations: 1-888-999-2089
Hotel Reservation Cut-off Date: 09/21/11

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Cancellation Policy: Cancellations received up to 14 working days before the workshop are refundable, minus a \$50 registration service charge. After that, cancellations are subject to the entire fee, which you may apply toward a future conference or workshop. Please note: if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time. For more information regarding refund, complaint, and/or program cancellation policies, please contact our office at 1-800-875-1760.

San Antonio, TX

Oct. 13–15

USA Divorce Financial Topics Workshop '11

- \$895 per person
- \$795 for CDFA members

Who should attend?

The level of this series is advanced; attendees will include CDFA™, CPA, CFP® financial professionals, and lawyers. Even if you have attended a prior IDFA™ Workshop, you won't want to miss this newest series.

Receive up to 15 CE Credits for your CDFA™ and CPA designations and up to 12 hours of CE Credits for your CFP®* and ChFC certifications!

*pending final approval

Prerequisites

No advance preparation is required. In order to attend, you must currently be a CDFA™, CPA, CFP®, financial professional, or a lawyer.



Join us in San Antonio from Oct. 13th to 15th, 2011 to acquire new skills and knowledge about divorce-related issues, and to network with your peers.

The Topics and Presenters

Depositions, Interrogatories, and Helping to Build a Trial Book: An Untapped Opportunity for Financial Pros. A financial professional's technical and organizational skills can be put to work, add tremendous value, and assist with strategy in matrimonial cases beyond the traditional scope of services for which he/she is hired. Whether or not a case goes to trial, this session will teach a financial pro how to be invaluable to the attorney and the client as a case progresses through possible depositions, interrogatories, and trial preparation. The **Hon. Kathleen McCarthy** has served in the Family Division of the Wayne County Circuit Court since her election to the bench in 2000.

Dividing Retirement Benefits: What To Consider. This session will answer questions such as:

- ERISA vs non-ERISA Plans – How do they differ?
- Separate vs Shared Orders – Which is better for your client?
- Survivorship Election – When to consider this, and what are the pluses and minuses?
- Disability vs Pension – What is divisible and when?
- Division of Account Balance Plans – What are the different methods to determine the marital portion?

Robert Guarnera (MSPA, FCA, MAAA, EA, CPC) is president of Pension Actuaries Inc.

The Family Business in Divorce. Statistics show that only about 30% of family businesses successfully transition from the first generation to the second; about 15% successfully transition to the third generation and less than 5% to the fourth generation. Combined with a 50% divorce rate – and with many spouses being partners in the family business – the ramifications can be devastating. This session will cover the financial, emotional, and legal strategies to help minimize the impact of divorce on a family business. **Norman S. Heller (Esq.)** is a partner and Matrimonial Group Practice Leader at Blank Rome, LLP, in New York City.

Forensic Engagements in Divorce. Judges and attorneys are increasingly relying on CDFAs to handle –

and educate them about – complex divorce financial issues. This session will provide expert tips, techniques, and working knowledge of traditional forensic engagements. Learn how your work as a CDFA can be invaluable on a “divorce team”. Topics will include:

- Lifestyle Analysis and undisclosed income
- How to examine and analyze specific transactions
- Cash businesses- unique issues
- Large company executive compensation – can it be manipulated, and is so, how?

Mark Harrison (CPA, ABV, CFF, Esq.) is Managing Member of Meyers Harrison & Pia, LLC. Founder and president of Smith Divorce Strategies in NYC. **Michelle Smith (CFP®, CDFA™)** is Chair of IDFA's Conferences Committee and sits on the IDFA Board of Advisors.

Tools of the Trade. The scope of services for which a CDFA is hired can include production of financial reports, illustrating financial facts in a case, and preparation of statements of net-worth/financial affidavits. This session will focus on a seasoned CDFA's work product and how to distinguish and customize financial analysis for divorce. With a specialty in divorce financial analyst services, **Seth Kaplan (CFP®, CDFATM)** has more than 14 years of experience working in the financial industry. Chair of IDFA's Practice Standards Committee, he sits on the IDFA Board of Advisors.

For more information, or to reserve your space in the Workshop, please contact IDFA™ today.

- Phone: (800) 875-1760
- Fax: (989) 794-5990
- E-mail: Shar.Banks@InstituteDFA.com
- Website: www.InstituteDFA.com



The Institute for Divorce Financial Analysts™ is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

The Schedule

Thursday, Oct. 13th

8:00 a.m.–9:00 a.m.

- **Alamo: Breakfast and Registration**

9:00 a.m.–12:00 p.m.

- “Depositions & Interrogatories”
- “Tools of the Trade”

12:00 p.m.–1:00 p.m.

- **Alamo: Lunch**

1:00 p.m.–4:00 p.m.

- “The Family Business in Divorce”
- “Forensic Engagements in Divorce”

4:00 p.m.–6 p.m.

- **Alamo: Networking and Cocktail Reception**

Friday, Oct. 14th

8:00 a.m.–9:00 a.m.

- **Alamo: Breakfast**

9:00 a.m.–12:00 p.m.

- “The Family Business in Divorce”
- “Forensic Engagements in Divorce”

12:00 p.m.–1:00 p.m.

- **Alamo: Lunch**

1:00 p.m.–4:00 p.m.

- “Dividing the Retirement Benefits”
- “Tools of the Trade”

Saturday, Oct. 15th

8:00 a.m.–9:00 a.m.

- **Alamo: Breakfast**

9:00 a.m.–12:00 p.m.

- “Dividing the Retirement Benefits”
- “Depositions & Interrogatories”