

MARKETING YOUR CDFA NICHE



Panelist: Donna M. Cheswick, CDFA™ ADFA™



- Partner, Vice-President, and Financial Advisor with Medallion Wealth Management, Inc.
- Owner of Cheswick Divorce Solutions LLC.
- Serves as a collaborative financial neutral and mediator.
- Has been teaching Divorce Workshops for Women since 2008.
- Author of numerous divorce articles for local/national print and online publications.

Panelist: Nancy Hetrick, ADFA™, MAFF™, AWMA®



- Founder, CEO Smarter Divorce Solutions
- Founder DEO Divorce Financial Planner Training Center
- Author of Divorce is Not For Dummies: How to Cover Your Assets
- Works as mediator, financial neutral, expert witness, and litigation support
- Master Analyst in Financial Forensics, MAFF™

Panelist: Stacy Francis, CFP®, CDFATM, CESTM



- President & CEO of Francis Financial, Inc.
- Founder of Savvy Ladies.
- Director of the Association of Divorce Financial Planners (ADFP) Greater NY Metro Chapter.
- Featured as an expert in over 200 media publications including being a member of CNBC/s Digital Financial Advisor Council, Forbes Finance Council, and expert contributor to the Wall Street Journal.
- Investment News 2016 Women to Watch.
- Financial Planning Associations' Heart of Financial Planning Award.
- Financial Planning Magazine's Pro Bono Award.
- CNN Money Magazine National Money Hero.
- Women's Choice Award – Best Financial Advisors for Women.

Panelist: Heather Brontas, CFP®, CRPC®, CDFATM



- Financial Advisor with Ameriprise Financial in North Carolina.
- 20 years of experience in the industry.
- Speaker at the 2015 New Hampshire Association for Justice Family Law Forum.

Your divorce niche can differentiate you from other financial advisors and allow you to help people in need...all while growing your business!



DIVORCE PRACTICE MUST HAVE'S

- Effective divorce elevator pitch
- Essential items to include on your divorce practice website
- How to handle initial prospect inquiries
- Prospect follow up procedures



Psychographics

- Beyond the demographics of your ideal client.
- How to implement this into your divorce marketing plan.
- Recognizing changes as your business evolves




Print: Define Your Target Market



Print: What Works and What Doesn't

- Options
 - Newspapers
 - Neighborhood
 - Golf Courses
 - Restaurant Tables
 - Educational Marketing
 - Brochures and Flyers
 - Articles for Attorney Offices



Educational Marketing

- Paid spots printed as articles
- Radio shows
- TV spots on local shows
- Guest on podcasts
- Host your own podcast
- Interview attorneys for book



WHY PUBLIC RELATIONS?



WHY PUBLIC RELATIONS?

- Credibility
- Recognition
- Prospecting
- Free** marketing



UNDERSTAND YOUR GOALS

A good plan supports the **specific goal** of your organization by:

Create S.M.A.R.T. Goals



- Increasing client retention and referrals.
- Reaching a broader customer base.
- Enhancing your image in local / professional / national communities.

Press - Lead Generating Services

- Use lead generating services to increase your PR opportunities.
 - ✓ Prleads.com
 - ✓ helpareporter.com
 - ✓ Register with AAIH, NAPFA, and FPA for reporter contacts

FINANCIAL EXPERT: Overcoming Retirement Losses - FIREHOUSE

For what we are hoping will be an uplifting story for all of us watching our retirement savings evaporate, a top personal finance publication is looking for several types of folks who weathered the stock market collapse of 2008. We need: 1) a person who was within five years of retirement who has since rebuilt his or her portfolio and been able to retire comfortably; 2) someone who was laid off in his or her 50s during the last recession and has successfully pivoted and is totally back on track for retirement; and 3) someone who was already retired when their portfolio took a big hit and had to return to work or found some other source of income -- like cashing in a no-longer-needed life insurance policy, renting out their vacation home or adjusting their lifestyle for a couple of years. If you have or are a candidate willing to share both details and wisdom, please e-mail me. Contact: Barbara Burgower Horstem, rburste@retire.org.

Create a media list

- Read, watch and listen to media outlets.
- Develop several lists including specialty markets.
 - ✓ Divorce
 - ✓ Women general interest
 - ✓ Personal finance
- Update your list with contact names as least every 3-6 months.
- Visit mediabistro.com to track reporter job changes and updates.



PR STEPS FOR YOUR PR PLAN

Sample Media List

First	Last	Position	Publication	Address 1	City	State	Zip	Phone	Email
Julie	Fishman-Lapin	Business Reporter	Advocate	75 Tresser Blvd	Stamford	CT	06901-3300	(203) 964-2417	julie.lapin@sctri.com
Rich	Lee	Business Assistant	Advocate	75 Tresser Blvd	Stamford	CT	06901-3300	(203) 299-5537	rich.lee@sctri.com
Jim	Zebora	Editor	Advocate	75 Tresser Blvd	Stamford	CT	06901-3300	(203) 964-2420	jim.zebora@sctri.com
Gina	Osnovitch	Business Editor	Brooklyn Daily Eagle	30 Henry St	Brooklyn	NY	11201-1338	(718) 422-7400	gina@brooklyneagle.net
Pam	Dawkins	Business Editor	Connecticut Post	410 State St	Bridgeport	CT	06604-4560	(203) 330-4351	pdawkins@post.com
Marcia	Stepanek	Editor in Chief	Contribute New York	630 5th Ave	New York	NY	10111-0001	(212) 756-0041	editor@contribute.com
Jay	Cooke	Business Editor	Courier News	1201 US Highway 22	Bridgewater	NJ	08807-2977	(908) 707-3165	jcooke@c-n.com
Aaron	Elslein	Senior Reporter	Crain's New York	711 3rd Ave	New York	NY	10017	(212) 210-0730	aelslein@crain.com
Warren	Borson	Finance Columnist	Daily Record	800 Jefferson Rd	Parappany	NJ	07054-3754	(973) 428-4647	wborson@gannett.com
Genaro	Saloni	Business Reporter	El Canillita	8 West St	Danbury	CT	06810-7839	(203) 798-2120	advertis@elcanillita.com
Sahnya	Shutebrandt	Business Reporter	El Canillita	8 West St	Danbury	CT	06810-7839	(203) 798-2120	advertis@elcanillita.com
Pedro	Frianeada	Business Editor	El Diario/La Prensa	345 Hudson St	New York	NY	10014-4502	(212) 807-4754	pedro.frianeada@eldiario.com
Julie	Fishman-Lapin	Business Reporter	Greenwich Time	PO Box 9307	Stamford	CT	06904-9307	(203) 964-2417	julie.lapin@sctri.com
Jim	Zebora	Business Editor	Greenwich Time	75 Tresser Blvd	Stamford	CT	06901-3304	(203) 964-2420	jim.zebora@sctri.com

Creating Solid Relationships with Reporters

- Handwritten thank you notes
- Offering breaking news, recent studies, important facts, etc.
- Email comments on their articles.



Promote all media hits


- Google Alerts
- Web search
- Send email announcement
- TV
- Plaques
- Bio



MAKING PR EFFECTIVE



The Power of Education
Divorce Workshops



**SPRING 2017
Divorce Workshops for Women**

Specialized workshops on what women need to know about the challenges of divorce.

SCHEDULE OF EVENTS	Registration and Wellness
REGISTRATION: 1 hour 30 minutes "Legal Basics of Divorce" Registration fee without credit fee included Includes the major process: Child custody Child support 2007 and beyond support	Thursday, March 23, 2017 8:30 AM - 12:30 PM DeWitt Public Village 700 DeWitt Blvd., Menomonie
REGISTRATION: 1 hour 30 minutes "Financial Basics of Divorce" Property and Debt Division Financial management How to protect your assets for an equitable distribution of assets	Saturday, April 22, 2017 8:30 AM - 12:30 PM Medation Wealth Management 2405 N. Jackson Blvd., Suite 2103 Franklin Park
REGISTRATION: 1 hour 30 minutes "Spending Responsibly: Control of Your Money" Retirement investment programs Investment management options How to protect your assets for an equitable distribution of assets	Saturday, May 20, 2017 9:00 AM - 1:00 PM Sharpshooter Public Library 1312 Main Street, Sharpshooter
REGISTRATION: 1 hour 30 minutes "Healthy Support" Divorce mediation and the child Support and child custody Helping your family cope with the news Publishing and support	Saturday, June 3, 2017 9:00 AM - 1:00 PM Northlander Presbyterian Church 701 Washington Road Honest Litchman

Free registration is required to Division of FSA 983-9835. Sponsored by: (Divorce Education Institute) Ltd. Investment of \$ 15 per participant. Cash on checks only. no debit/credit cards accepted.

The Power of Education – Divorce Workshop Planning

- Finding a Suitable Location
- How to Partner with Other Professionals
- Educational Content



Separated People now Contacting Certified Divorce Financial Analysts® (CDFA™) Professionals Before Lawyers: Survey

People at the beginning of the divorce process are recognizing that the financial issues they're facing are as important as the legal issues. The survey of divorce attorneys and certified divorce financial analysts about their clients' beliefs has shown an upward trend.

In fact, 85% of the 102 CDFA professionals from various North America who responded to a recent survey agreed that their clients' financial issues are as important as their legal issues. This is up from 75% in a 2013 survey. The survey also found that 60% of CDFA professionals believe that their clients' financial issues are as important as their legal issues. This is up from 50% in a 2013 survey. The survey also found that 60% of CDFA professionals believe that their clients' financial issues are as important as their legal issues. This is up from 50% in a 2013 survey.

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Focus on the Divorcing Client

2013 - IDFA Survey



13-week support group to help divorcing individuals recover from the hurt of separation or divorce.

Online

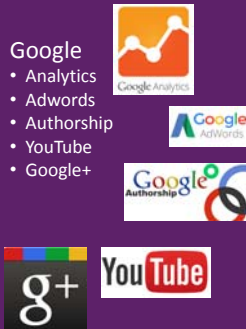


Online...

- Blogging
- Writing – for everyone all the time!
- Social Media
- Facebook Live
- Participation
- Content, content, content

Google

- Analytics
- Adwords
- Authorship
- YouTube
- Google+





Online Referral Sites

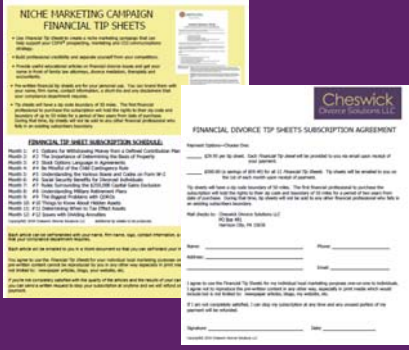
- Divorce360.com
- InstituteDFA.com
- Mediate.com
- DivorceMagazine.com
- NAWBO.org
- ACRnet.org
- FamilyLawSoftware.com
- DivorcedMoms.com

Niche Marketing Campaigns



- Build Marketing Lists
- Articles/Content
- Build credibility and demonstrate your expertise

Divorce Financial Tip Sheets for COI's



Dear _____,

I would like to take this opportunity to introduce myself. I am Donna Cheswick a financial advisor with Mediation Wealth Management Inc., as well as a certified divorce financial analyst (CDFA) and owner of Cheswick Divorce Solutions LLC.

Knowing that you are a well-respected attorney with a reputation in the area of family law, I am interested in becoming a resource to help you to help your clients avoid the long term financial pitfalls that accompany divorce.

The services I provide include:

- Compiling comprehensive financial information and preparing net worth statements
- Analyzing current and projected financial needs, including lifestyle assessment and spending patterns
- Valuing retirement and pension plans (present value calculations)
- Establishing cost basis of marital assets and analyzing the tax consequences of selling cash asset, including stock options and other forms of executive compensation
- Analyzing settlement proposals and evaluating the long-term financial impact and tax implications of each option (generating multiple scenarios)
- Preparing financial exhibits for negotiations or hearings/trials and providing expert witness testimony
- QDRO Draft Preparation: includes research, draft preparation, and submission

Many attorneys don't have the luxury of having a financial expert on staff. With over 30 years of financial experience, I can handle the financial complexities of your cases and provide support to help your divorcing clients better understand their financial circumstances. My assistance can help so that you can spend more of your time focusing on the legal aspects of divorce and taking on new cases.



Attached is a monthly column titled "Financial Divorce Tips" that will address some of the most common financial issues that divorce attorneys face with their clients. I usually send out a new "tip" each month.

I would welcome the opportunity to talk with you and will reach out to you in the next week. I would be happy to answer any questions you may have about my services or my firm.

Thank you, I appreciate your time and look forward to the chance to work with you.

Marketing to Family Law Attorneys


- Identify your skill set
- Convincing attorneys why you should do the math for them
- Post divorce work
- Billing and follow up




Studies/ Thought Leadership

Please Take My
Survey



NETWORKING



- Understand your ideal referral sources
- Cultivate relationships
- Host monthly luncheons
- Create a COI board
- Focused Networking groups



EVENTS

Hosting events is an incredible way to market yourself and your practice.

- ✓ Networking events
- ✓ Educational Seminars
- ✓ Expert Panels
- ✓ Collaborative events with other professionals
- ✓ Client satisfaction events




Networking Groups

- Being more effective with your marketing efforts.
- Building your own group based on your target audience
- Growing the group slowly and efficiently



Divorce Alliance Chapter



What is Divorce Alliance?

Divorce Alliance is a membership association bringing together professionals from all aspects of the divorce community. The membership provides educational experiences with leading industry experts and peer-to-peer discourse with knowledgeable and accomplished professionals. Through monthly chapter meetings, divorce professionals from all disciplines can come together to learn, network, and strengthen the bonds of their own divorce community.



Divorce Alliance Benefits

- Position yourself as the expert
- Attract Attorneys for each CLE
- Craft your own content
- Facilitate sharing
- Build trust
- Another online directory with a backlink

Leveraging Business Success & Inspiration with a Mastermind Group

A Mastermind Group is a small group of like-minded people who meet for mutual brainstorming and accountability sessions.

Leveraging Business Success & Inspiration with a Mastermind Group

- What are the benefits?
- How to start a group
- Who to invite
- Meeting agenda
- Procedures